

Tourism as a Livelihood Strategy in Indigenous Communities: Case Studies from Taiwan

by

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ABSTRACT

Tourism has become an important option for economic development and the cultural survival of aboriginal people, yet the academic work has overlooked an issue of cultural sustainability and the majority of the literature on indigenous tourism is from a non-indigenous perspective. Although the sustainable livelihood framework does not clearly address the cultural part of life, the approach requires that activities, such as tourism, are placed in a broader context so that they can be examined from an indigenous perspective on sustainability. The purpose of this study is to assess the role that tourism is playing in two indigenous communities' livelihood strategies in Taiwan from an indigenous perspective using the sustainable livelihood framework as an organizing framework. The examination of the evolution of livelihood strategies is the main focus of the study.

A review of literature identifies weaknesses in the concepts of sustainable development and sustainable tourism and provides legitimacy for using the sustainable livelihood approach to examine the roles that tourism plays in indigenous people's daily lives. Culture is embedded in daily life and the approach allows the researcher to explore the meanings behind people's daily activities. Also, tourism needs to be placed in a broader context in order to identify whether any linkages exist between it and other sectors of the economy and how tourism can better fit in with exiting livelihood strategies.

The research is a collaborative study of two Cou aboriginal communities (i.e., Shanmei and Chashan) in central Taiwan using qualitative research methods. The sustainable livelihood framework is used as a vehicle for guiding research and analysis. Results indicate that Cou traditional livelihoods and their traditional social structure have been closely linked. The shift of Cou livelihoods from self-sustaining in the past to being linked increasingly to the global economic market system at present comes from a variety of external and internal factors (e.g., policy, history, politics, macro-economic conditions). The promotion of tourism development and cultural industries by the government in recent years has provided aboriginal people with a new opportunity (tourism) in which they can make use of their culture as an advantage (culture as an attraction) to possibly reverse the inferior position. In addition to being an attraction for economic development, culture has many implications for the way things are done and for the distribution of benefits.

In both villages, people employ a wide range of resources and livelihoods strategies to support themselves. Tourism has been incorporated into the livelihoods of both villages in forms of employment (regular and occasional) and various collective and self-owned enterprises (e.g., restaurants, homestays, café, food stalls, handicraft stores and campsites). Tourism activities have the potential both to complement and to compete with other economic activities in various forms. Conflicts between tourism-related economic activities and other activities may not be obvious in terms of the use of land, water and time. The benefits and costs of each tourism activity experienced by different stakeholder groups (mainly by age and gender) vary, depending on different personal situations.

The sustainable livelihoods framework was examined and used to assess the context and forms in which tourism might contribute to sustainable livelihood outcomes. Institutional processes and organizational structures are one main factor determining whether different assets, tangible and intangible, are accumulated or depleted on individual, household, and community scales. The comparison of the two cases revealed that, in the context of capitalist market economy in which people pursue the maximization of individual interests, the following situation is most likely to lead to sustainable outcome (socio-culturally, economically, and environmentally) in the context of indigenous communities. That is tourism enterprises need to be operated through institutions with a communal mechanism and through efficient operation of the communities' organizations based on collective knowledge guided by Cou culture.

Sustainable livelihood thinking is useful to the concept of sustainable development because it can be used as an analytical and practical tool for guiding studies of environment and development. It also serves as a means of integrating three modes of thinking: environmental thinking which stresses sustainability, development thinking which stresses production and growth, and livelihood thinking which stresses sustenance for the poor.

The approach facilitates examination of the reality of aboriginal people and poor people in rural and remote areas. The approach focuses on the local impacts of change, recognizes the complexity of people's lives, acknowledges that people have different and sometimes complex livelihood strategies and addresses benefits that are defined by the marginalized communities themselves. It acknowledges the dynamism of the factors that influence livelihoods: it recognizes that change occurs and people accommodate, learn from change and plan, adapt and respond to change. It focuses on accommodating traditional knowledge and skills to create conditions for marginalized communities to enhance their well-being. It assists in understanding that traditional knowledge and its innovation provide a basis for the development of coping mechanisms and adaptive strategies to buffer the forces which threaten livelihoods.

The sustainable livelihood framework is useful because it places the interests of local people at the centre. Such an approach incorporates tourism as one component of development, particularly for indigenous people, and explores how positive development impacts can be expanded and negative ones can be reduced. However, unless supplemented, the framework may not do justice to the importance of culture and the prominent roles played by key individuals.

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CHAPTER 1

CONTEXT, RATIONALE AND SCOPE

1.1 Introduction

Tourism has become an important option for economic development and the cultural survival of aboriginal people, yet the academic work has overlooked the issue of cultural sustainability. Although Scoones's (1998) sustainable livelihood framework does not clearly address the cultural part of life, the framework requires that activities, such as tourism, are placed in a broader context so that they can be examined from an indigenous perspective on sustainability. This research is based on two case studies of indigenous communities in Taiwan. Section 1.2 provides the background, context and rationale for undertaking this research. It includes a discussion of some key ideas that shape the research, such as sustainable development, sustainable tourism, sustainable livelihoods and sustainability. Section 1.3 outlines the research scope and focus. It lists the detailed research objectives and provides a description of the case study context. Finally, section 1.4 describes the structure of the dissertation.

1.2 Research Context and Rationale

Historically, there has been an unbalanced relationship between indigenous people and non-indigenous people throughout the world. A majority of the contact between these groups has been characterized by the exploitation of indigenous people for the benefit of the dominating non-indigenous groups. As a result, indigenous people have struggled in their search for poverty reduction, cultural survival, self-determination, justice and equity (Butler and Hinch, 1996). Tourism has been raised frequently as a potentially useful mechanism for contributing at least partial solutions to the many challenges facing indigenous people (IUOTO, 1963; Zinder, 1969).

The situations described above are particularly true of indigenous peoples in Taiwan. First named Ibla Formosa by Portuguese mariners, Taiwan has been colonized by the Spanish (1626-1642), the Dutch (1624-1662), the Chinese Ming Dynasty loyalist Koxinga (1662-1683) and the Ching Dynasty (1663-1895), the Japanese (1895-1945), and the Republic of China (1945 to the present). Today it is claimed by the People's Republic of China, the Republic of

China, and Taiwanese Minnan-speaking nationalists who want independence. The island's 439,000 aboriginal people are frequently overlooked in geopolitical assessments of Taiwan. Yet at nearly two percent of Taiwan's 22 million people, they compose a similar percentage of the national population as do First Nations in Canada (3 percent) and Australia (1.8 percent) (Munsterhjelm, 2002). The number of officially recognized peoples in Taiwan stands at 12 including Atayal (Tayal), Saisiyat, Truku, Thao, Bunun, Kavalan, Tsou (Cou), Amis, Rukai, Puyuma, Paiwan, and Yami. Figure 1-1 illustrates their geographical distributions. Today's official classification schemes were originally developed by Japanese government anthropologists a century ago as part of colonization efforts.

Household incomes of Taiwanese aboriginal people are less than 40 percent of the national average and aboriginal unemployment is significantly higher than the national average (Munsterhjelm, 2002). Some attribute high aboriginal unemployment to the importation of nearly 300,000 "guest workers" from the Philippines, Thailand, and Indonesia who compete directly for jobs with aborigines. In rural areas, aboriginal farmers are typically small-scale and are adversely affected by the agricultural sector's increasing openness to foreign agribusiness imports, especially since Taiwan became a member of the World Trade Organization in 2001. Taiwan is also undergoing rapid economic restructuring processes in which labour-intensive industries relocate to lower-cost areas like the People's Republic of China and Vietnam. Additionally, environmental and economic devastation caused by the September 21, 1999, earthquake and numerous typhoons have created a situation in which Taiwanese aboriginal peoples are being squeezed from all sides. The Taiwanese government has encouraged tourism development in rural areas in response to these problems. Tourism has become an option for Taiwanese aboriginal peoples faced with responding to Taiwan's economic changes.

A western-based economic rationale is that income generated through tourism can bring indigenous people increased economic independence, which will be accompanied by a higher degree of self-determination and cultural pride as poverty is decreased. Unlike many other forms of economic activity, such as the extraction of some types of forest resources from indigenous lands, appropriately planned and managed tourism is seen as possibly being a sustainable activity that is generally consistent with indigenous values about the sanctity of the land and people's relationship to it. From an economic perspective, indigenous people are

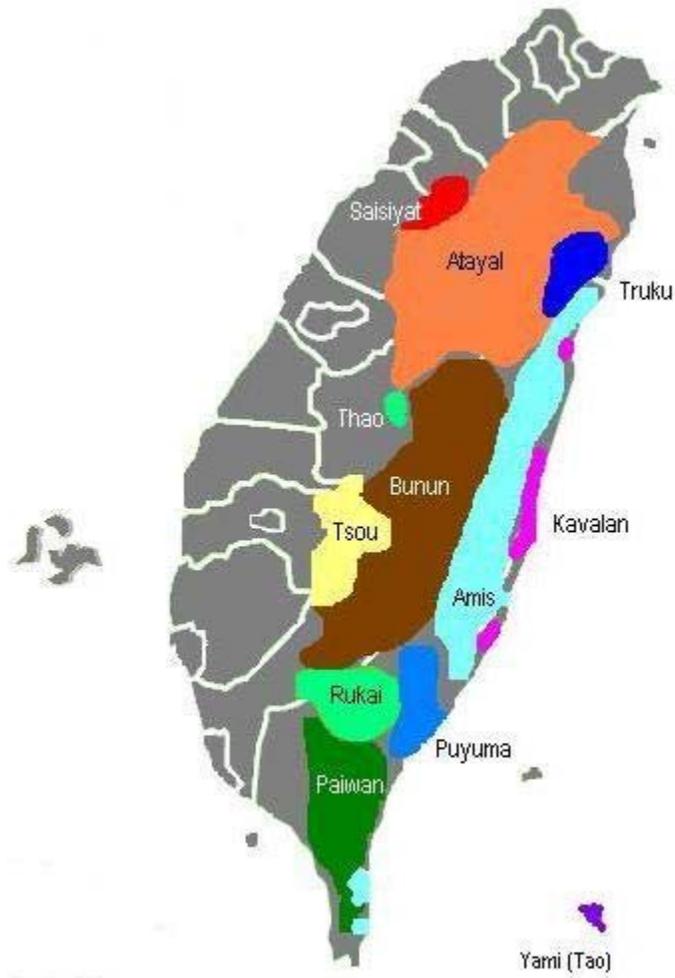


Figure 1-1: Map of Highland Tribes According to Traditional Geographical Distribution.

From Answers Corporation (2006)

seen to have a competitive tourism advantage because they possess unique cultural and physical resources. Therefore, a symbiotic relationship may exist to the extent that cultural survival and physical environmental preservation will contribute to economic success; and economic success will contribute to cultural survival and physical environmental preservation (Butler and Hinch, 1996).

Altman's (1989) study of tourism in aboriginal communities in Australia showed that tourism is regarded by aboriginal leaders as a tool to improve the marginalized economic status and political power of their people. Many aboriginal people wish to gain financial benefits from tourism and, at the same time, to minimize associated social and cultural costs. Therefore, each of these aspects of change is often considered in development options. In this broader perspective, development is not limited to issues like material expansion, increased cash income, and high levels of formal employment, but also involves social and cultural issues, the potential for increased political power, and the possibility of widened future options (Altman, 1989).

Nonetheless, the driving force of indigenous tourism has come from a demand perspective in the motivations of tourists to see "other" cultures that are often regarded as being wild, primitive and exotic or, as a minimum, are different from their own. At the present time, the scale and speed of growth of such tourism is spreading into formerly ignored peripheral and remote areas that are the home areas of the indigenous populations who had not previously been exposed to such development (Butler and Finch, 1996). Could indigenous people benefit from such tourism through increased economic independence accompanied by a higher degree of self-determination and culture pride? Attempts to answer this question should be based on an understanding of whether tourism activities in which indigenous people are directly involved are controlled by them, as well as whether their culture serves as the essence of the attraction. Literature reveals that the majority of disadvantages of tourism development occur when tourism is imposed on indigenous communities and is under external control (Butler and Finch, 1996). However, such questions as "what is indigenous culture?"; "how to examine whether a specific tourism product can fully represent indigenous culture?"; "how to evaluate whether such a product is used for good or bad to indigenous people?" and "from whose perspective?" are rarely examined directly in the literature. Understanding what

indigenous culture is and endeavouring to sustain it are formidable challenges because, among other reasons, culture is not static.

In order to move away from a focus primarily on the disadvantages of tourism development, the concept of sustainable tourism has been promoted, which is fundamentally linked to the idea of sustainable development as interpreted in the Brundtland Report of 1987. Nonetheless, the Brundtland Report does not mention tourism. The major problems with sustainable development are the ambiguity over the meaning of the term, the questionable success of putting the idea into practice, and the neglect of tourism and social and cultural issues due to the focus on the demands that economic activities place on the physical environment. The term “sustainable tourism” implies that it has already been decided that tourism is the way towards sustainability without considering other economic options. It is necessary to introduce a more holistic approach to explore in what contexts and forms tourism might contribute to sustainability. This will require the achievement of a balance between economic viability, cultural integrity and social cohesion, and the maintenance of the physical environment.

The sustainable livelihoods approach, as proposed in this study, provides a realistic and comprehensive perspective for exploring the consequences of tourism and other development on indigenous communities. Under such an approach, tourism can be set into the cultural context of indigenous place characteristics, which both condition and are conditioned by economic, socio-cultural, political, ecological, institutional and technical forces that are exogenous and endogenous to indigenous communities as well as dynamic. It is essential to understand how tourism interacts with these factors as there are marked positive and negative effects between the various sectors, levels (scales) and interests which dictate prospects for sustainable outcomes (Cater, 2002).

Conventional tourism perspectives tend to focus primarily on economic, cultural or environmental impacts, usually in isolation from each other. The livelihoods approach, however, places the interests of local people at the centre and emphasises the multiple interactions between the various factors which affect livelihoods and the various consequent livelihood outcomes. Such an approach enables the researcher to incorporate tourism as one possible component of development, particularly for indigenous people, and explores how positive development impacts can be expanded and negative ones can be reduced (Ashley,

2000). The approach is different from that reported in the majority of tourism literature which focus only on tourism. Development impacts - particularly as assessed by planners and consultants are often narrow assessments of local benefits focusing on little more than job creation and cash income. Conservationists usually come from another perspective, concentrating upon environmental matters. The perspectives commonly overlook the fact that all human development and economic growth are ultimately rooted in livelihoods – not in jobs per se but in the diverse range of activities that people engage in in order to make their living. As Chambers (1986) indicated, unless the needs, interests and priorities of poor people are put first, objectives for environmental quality and development are unlikely to be attained. By taking a livelihoods approach, the scope of analysis is broadened to incorporate a wider range of implications – direct and indirect, positive and negative - that reflect the more complex reality of indigenous people’s concerns and aspirations (Ashley, 2000).

An attempt is made in this thesis to include an indigenous perspective to understand their views and responses concerning the changes induced by tourism development. This is a novel approach since the majority of the literature on indigenous people and tourism is undertaken from non-indigenous perspectives.

1.3 Research Scope and Focus

The purpose of this study is to assess the utility of the sustainable livelihoods framework (Figure 2-3 in Section 2.4.4) for examining and assessing the implications of the introduction of a new activity (i.e. tourism) in indigenous communities. The sustainable livelihood approach integrates environmental, political, historical, social and economic issues in a holistic framework for analysis from the beginning, so it is useful in forcing the consideration of tourism in a broad context. This is especially true in identifying not only the types of assets which people use, but also how existing livelihoods can be strengthened with new and potentially appropriate economic activities (e.g., tourism) and corresponding social and economic investments (UNDP, 1999).

Accordingly, a number of objectives have been developed to achieve the purpose of the study:

1. To identify different livelihood pathways over different time-scales by using an historical approach for analysis;

2. To identify how and why tourism development has been introduced;
3. To develop an overall understanding of how people construct their livelihoods (by investigating the livelihoods of the two indigenous communities);
4. To examine if and how tourism has been incorporated into the livelihoods.
*[Given a particular **context** (of policy setting, politics, history, agroecology and socio-economic conditions), what combination of **livelihood resources** (different types of 'capital'), through what **institutional processes** (embedded in a matrix of formal and informal institutions and organizations), has resulted in the ability to follow what combination of **livelihood strategies** (agricultural intensification/extensification and/or livelihood diversification) with what **outcomes**? (Scoones, 1998, p.3)];*
5. To examine the extent to which tourism development-related initiatives, planning, and management have been experienced by different stakeholders (stakeholder groups) as positive (opportunities, benefits, and /or advantages), negative (threats, costs, and /or disadvantages) or neutral;
6. To explore whether the livelihoods are sustainable (criteria are described below) and in what context and form, tourism might contribute to sustainability.
 - Livelihood
 - More income
 - Well-being and capabilities
 - Sustainability
 - Reduced vulnerability
 - Livelihood adaptation and resilience enhanced
 - More sustainable use of the natural resource base
 - **Equity** refers to equality of opportunity and recognition of needs amongst individuals and households, social groups and communities, men and women, present and future generations, and human and other species. Inequity promotes distortions in the uses of resources (Wall, 1993a, p.55)

- **Cultural Integrity** refers to the preservation and renewal of the life-enhancing, celebratory traditions of culture as expressed in religion, arts and institutions (Wall, 1993a, p.55)
- **Development as realization of potential** through which capabilities to improve the quality of life are enhanced (Wall, 1993a, p.55).

Cases are drawn from two indigenous villages of the Cou tribe in Taiwan, Shanmei and Chashan, where tourism initiatives are taking place. Shanmei has developed tourism for almost 20 years while Chashan only has been involved in tourism for about eight years. The sites were chosen not only because they have used aspects of Cou culture as tourism attractions to generate income, but also because the Cou culture has many implications for the way tourism development in these communities is being done. Shanmei villagers have restored the fish resources in the Danayigu River using traditional knowledge and they have established the first non-governmental ecological park in Taiwan (C.-R. Li, 2000). Chashan's main tourism attraction is pavilions which representing spirit of sharing of Cou culture. These cases are documented and then compared based on most of the components in the sustainable livelihood framework to examine the positive and negative consequences that different types of tourism can have on people's asset base, portfolio of diverse activities, the specific outcomes which they seek, and their influence over external organizations and context. Data were acquired mainly through qualitative methods including direct observation (e.g., taking photographs), participant observation, in-depth interviews (n=243) with key village informants, village residents, government officials, academics, and NGO staff and documentation analysis (Creswell, 1994; Patton, 2002).

1.4 Structure of Dissertation

The dissertation has eight chapters. This chapter has provided the context and rationale for the research, the purpose and consequent objectives, and a brief introduction to the research approach and the methods utilized in data acquisition. Chapter 2 critically reviews the concepts of sustainability, sustainable development, sustainable tourism and the sustainable livelihoods conceptual framework, which provides a realistic and comprehensive perspective for exploring the consequences of tourism in the context of indigenous communities. Chapter

3 outlines the qualitative methodology and the sustainable livelihood approach as it was used as a conceptual framework and analytical tool in this research. Chapters 4 to 6 present the results of the research as guided by the sustainable livelihood framework. Chapter 4 introduces the historical background and socio-economic context of the study area including the traditional social structure and social life of the Cou tribe and the trend towards tourism development in the area. Chapters 5 and 6 use Shanmei and Chashan as two cases respectively to explore the evolution of livelihood strategies before and after tourism development and to examine the adaptation of Cou society to internal and external pressures as well as their future goals and aspirations. Chapter 7 uses the sustainable livelihood framework to compare the results from the two case studies and to address the significance of institutional processes and organizational structures in the context of tourism development. From the comparison and discussion, strengths and weaknesses of the sustainable livelihood framework are addressed. Finally, Chapter 8 summarizes the principal findings and reviews the contributions of this research to the understanding of tourism in peripheral areas and as a development strategy for aboriginal communities.

CHAPTER 2

INDIGENOUS TOURISM AND SUSTAINABILITY

2.1 Introduction

Tourism has become increasingly important to many indigenous communities as it has potential to improve their marginalized economic status and increase their political power. However, the majority of the literature on indigenous people and tourism is undertaken from non-indigenous perspectives. There is a need to adopt an indigenous perspective to understand their views on what tourism is and what it brings. Chapter 2 first reviews the literature on the conception of tourism and points out the necessity to understand the meaning of tourism from an indigenous perspective when developing indigenous tourism. This is followed by the identification of the advantages and disadvantages of tourism as a development strategy for indigenous communities and the conditions that are most likely to lead to positive outcomes for them. This leads to a critical review of literature on sustainable development and sustainable tourism to identify their strengths and weaknesses. A review of the concepts of sustainability and sustainable livelihoods as a research approach is then undertaken as a means of broadening the scope of analysis to a wide range of livelihoods and impacts. In this way, an improved reflection of the complex reality of indigenous people's concerns and aspirations is sought. The review also reveals an insufficient academic understanding of the meaning of cultural sustainability.

2.2 Defining Tourism

Tourism has been defined in many ways and, as pointed out by S. Smith (1988), the definition provided often reflects users' own perceptions and interests. For economists, tourism is a route to macro-economic growth and, particularly, a means of generating foreign exchange. For the private sector, tourism is a commercial activity so the main concerns are product development, competitiveness and commercial returns. For conservationists, tourism is seen as a form of sustainable use of wild resources and, hence, as an incentive and a way to enhance conservation. For a community (the tourist receiving region), tourism is a powerful agent for change that influences the residents' lifestyles and, for the individual, tourism means

interesting activities that motivate people to be temporarily away from home (Ashley, 2000; Liu, 2002a).

Another perspective on the difficulty in defining tourism, as indicated by Telfer (1996), stems from the fact that there are several subjects to be considered under the general subject of “tourism”. These include: the demands of tourists (desires and motivations for travel and their means for travel), the supply of tourist resources from the travel industry (transportation, accommodation, food), and resulting impacts on the destination areas which have been categorized as social, economic and environmental (Mathieson and Wall, 1982). Different forms of tourism have been developed based on the motives of tourists who voluntarily visit a place away from home (V. Smith, 1989). From a supply-side perspective, S. Smith (1988, p.183) defined tourism as “...the aggregate of all businesses that directly provide goods or services to facilitate business, pleasure, and leisure activities away from the home environment.” Mathieson and Wall’s (1982, p.1) definition includes the aspects of both supply and demand, where: “Tourism is the temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations and the facilities created to cater to their needs.” Another more holistic definition of tourism incorporates both supply and demand aspects and includes the process and interaction of host and guests. Jafari (1977, p.6) proposed that “Tourism is the study of man (sic) away from his usual habitat, of the industry which responds to his needs, and of the impacts that both he (sic) and the industry have on the host’s socio-cultural, economic, and physical environment.” For the purpose of this study, Jafari’s definition of tourism will be used in order to provide a broad perspective for exploring the relationships between indigenous people and tourism.

2.3 Advantages and Disadvantages Associated with Tourism Development

2.3.1 Impacts Associated with Tourism Development

There are a variety of reasons for indigenous people to become involved in tourism; however, there are also various disadvantages this could have for indigenous people. Table 2-1 provides an overview of various positive and negative impacts, which the literature indicates

are associated with tourism development. It has to be noted that, from the different perspectives of different interest groups, or in different contexts and situations, some of the negative impacts could be positive and vice versa (Walker, 1998). Moreover, each component is not isolated and is interrelated with other components.

Table 2-1: Summary of Impacts Associated with Tourism Development

Positive Impacts (advantages)	Negative Impacts (disadvantages)	Sources:
Biophysical Changes		
<ol style="list-style-type: none"> 1. New land use improves land and resource conservation. 2. Provision of new infrastructure, facilities and service to local community. 	<ol style="list-style-type: none"> 1. New land use diminishes land and resource health and conservation, increases use and trampling. 2. New land uses undermine traditional customs, laws, beliefs, perhaps creating new forms of land and resource management or decreased environmental conservation. 3. Loss of access and land right to essential land resources for livelihood. 4. New pattern of land ownership. 5. Environmental risks, impacts and spin-off impacts introduced. 6. Resource exploitation to take advantage of new economic opportunities and needs. 7. Increased competition for and consumption of scarce resources. 	<p>Pearce (1981); Mathieson & Wall (1982); Robben (1982); Volkman (1983); Doğan (1989); Barbier (1992); Shera & Matsuoka (1992); R. Smith (1992); Fenco Shawinigan Engineering Ltd. (1994); Lankford <i>et al.</i> (1994); Sullivan <i>et al.</i> (1995)</p>
Political Changes		
<ol style="list-style-type: none"> 1. Political recognition of the indigenous culture. 		<p>Ryan (1999)</p>
Economic Changes		
<ol style="list-style-type: none"> 1. Provides foreign exchange earnings, hard currency, national and regional economic development, and increased tax revenues. 2. New wage-based economic opportunities, particularly independence for women. 3. Increased wealth and/or standard of living at individual, regional and national levels. 4. Increased income security through economic diversity. 5. Improve marginal economic status and reduce high dependence on the welfare state. 6. Provide employment opportunities to unemployed or underemployed, skilled and unskilled. 7. May provide new markets for agriculture/sea product. 8. Ownership of tourism infrastructure. 9. Provide another livelihood option. 	<ol style="list-style-type: none"> 1. Job requirements may not match locals' skills. 2. Change from traditional or subsistence economies to market-based ones. 3. Economic leakage can promote uneven distribution of costs and benefits of development. 4. May necessitate a level of technology, infrastructure and foreign imports which the host country can not afford. 5. May increase local demand for foreign goods. 6. Limited, seasonal or specialized skill set developed. 7. Seasonal or temporal work. 8. Can increase local cost of living. 9. Competitive industry so tourism developers' investments made on profits maximization not necessarily on community well being and equity. 10. Overdependence on a single industry. 11. Marginalization of indigenous tourism entrepreneurs. 	<p>Himmamowa (1975); V. Smith (1977); Pearce (1981); Callimanopulous (1982a, 1982b); Mathieson & Wall (1982); Pi-Sunyer (1982); Robben (1982); Volkman (1982, 1983); Davis <i>et al.</i> (1988); Altman (1989); King and Burton (1989); Boo (1990); Shera & Matsuoka (1992); King <i>et al.</i> (1993); Altman and Finlayson (1993); Lujan (1993); McKercher (1993); Fenco Shawinigan Engineering, Ltd. (1994); Lankford <i>et al.</i> (1994); Altman (1996); Cukier (1996); Editorial Staff for Travel and Tourism Intelligence (1996); Jenkins (1997); Ryan (1999); Ashley (2000)</p>

(Table continues)

**Table 2-1 Summary of Impacts Associated with Tourism Development
(continued)**

Positive Impacts (advantages)	Negative Impacts (disadvantages)	Sources:
Social Changes		
<ol style="list-style-type: none"> 1. May aspire to higher education in order to access new jobs, improved work ethic/attitude. 2. Smaller families are associated with more educated individuals. 3. Exposure to and appreciation of other culture. 4. Provision of social and recreational opportunities. 5. Improved quality of life. 6. Create social belonging. 	<ol style="list-style-type: none"> 1. Increased communication with external value systems and lifestyles may lead to new, social values and goals. 2. Increased number of permanent and/or temporary residents, changed social cohesion, dominance by outsiders. 3. Changes in gender roles and work responsibilities. 4. Migration to find new work. 5. May aggravate social inequalities and lead to theft and hostility. 6. Promote indigenous servitude to the rich. 7. Advertising can falsely portray local lifestyles. 8. Tourists confront rather than blend in with local society. 9. Development often beyond locals' control. 	<p>Himamowa (1975); Pearce (1981); Callimanopulous (1982a, 1982b); Mathieson & Wall (1982); Pi-Sunyer (1982); Robben (1982); Doğan (1989); Volkman (1983); Jafari (1989); Shera & Matsuoka (1992); R. Smith (1992); King <i>et al.</i> (1993); McKercher (1993); Fenco Shawinigan Engineering, Ltd. (1994); Lankford <i>et al.</i> (1994); Ceballos-Lascurain (1996); Cukier (1996); Long (1996); V. Smith (1996); Jenkins (1997); Ryan (1999)</p>
Cultural Changes		
<ol style="list-style-type: none"> 1. Opportunity to share culture and history, create better awareness of culture. 2. Opportunity for resurgence or maintenance of traditional art forms. 3. Promotion of good cultural exchanges between those who can travel and those who cannot. 4. Revitalization of traditional handicraft skills and performance . 5. From self-identity to communal identity. 6. Redefine and reclaim cultural and ethnic identity. 	<ol style="list-style-type: none"> 1. Increased contact with different cultural norms can lead to accelerated undermining of traditional cultures and beliefs, replacement of traditions with modern ideals and priorities. 2. Can challenge or even obliterate cultural and linguistic diversity. 3. Cultural changes may foster value and ideological rifts between younger and older generations. 4. Cultural can become “on display” for tourists, or lose its authenticity. 5. Loss of community identity 	<p>Cohen (1979); Pearce (1981); Callimanopulous (1982a, 1982b); Mathieson & Wall (1982); Pi-Sunyer (1982); Robben (1982); Volkman (1982, 1983); Doğan (1989); Jafari (1989); Lujan (1993); Nunez (1989); Swain (1989); R. Smith (1992); McKercher (1993); Lankford <i>et al.</i> (1994); Keane (1995); Ceballos-Lascurain (1996); Jenkins (1997); Nicholson (1997); Ryan (1999); Medina (2003)</p>
Psychological Changes		
<ol style="list-style-type: none"> 1. Financial benefits can decrease pressure of indebtedness and unemployment. 2. Creation of resistance groups and/or participation in development decisions can empower and increase perceived personal efficacy. 3. More social and recreational opportunities can increase psychological well being. 4. Increased confidence. 	<ol style="list-style-type: none"> 1. Uncertainty, fear, disempowerment, pessimism towards the future if changes are rapid, participation in decision-making is low, locals unable to assimilate or control changes 2. May trade social quality of life for increased physical/material quality. 3. Increase stress, violence, crime. 4. Increased population and traffic means decreased sense of security. 5. Hostility toward changes in life imposed by development. 	<p>Himamowa (1975); Davis <i>et al.</i> (1988); Jafari (1989); Shera & Matsuoka (1992); King <i>et al.</i> (1993); Ryan (1999)</p>

Source: adapted from Walker (1998, p.30-31)

2.3.2 Advantages and Disadvantages Specifically for Indigenous Communities

Indigenous tourism

Indigenous tourism refers to tourism activities in which indigenous people are directly involved either through control and /or by having their culture serve as the essence of the attraction (Butler and Hinch, 1996). The two key concepts of this phenomenon are illustrated in Figure 1. The horizontal axis represents the range of control that indigenous people have over a given tourism activity. At the left end of the continuum, indigenous peoples have no control, while at the right end they have total control including ownership and management interests. In between these two ends exists a number of gradations revealing different levels of the influence of indigenous peoples in various roles such as employees, advisory board members, and formal partners in development. The vertical axis represents the degree to which the tourist attraction is based on an indigenous theme. These themes range from being focused totally on indigenous culture to a total absence of an indigenous theme (Butler and Hinch, 1996).

		INDIGENOUS CONTROL	
		Low Degree of Control	High Degree of Control
INDIGENOUS THEME	Indigenous Theme Present	Culture Dispossessed	Culture Controlled
	Indigenous Theme Absent	Non-Indigenous Tourism	Diversified Indigenous

Figure 2-1: Indigenous Tourism

From Butler and Hinch (1996, p.10)

The level of control is the key condition in any kind of development. Whoever has control can generally influence the factors of scale, speed and nature of tourism development. Altman (1993) further defined control as the distinction between the situations where tourism is *invited* and those where it is *imposed*, and indicates that there is some correlation between *invited* and *imposed* tourism and direct and indirect participation in tourism. Other indicators of level of control include direct input into decision making and ownership of the tourism

infrastructure. Similarly, since an attraction is central to tourism activity, the extent to which the attraction is focused on indigenous culture is also an indicator of indigenous tourism. Tourism enterprises that are both controlled by indigenous people and which highlight an indigenous theme are most likely to lead to positive outcomes for indigenous groups. Tourism activity that is neither controlled by indigenous people nor features an indigenous theme, is considered as 'Non-Indigenous Tourism'. Tourism enterprises that are controlled by indigenous interests but which do not feature indigenous culture as a central attraction are considered to be 'Diversified Indigenous'. When there is a substantial level of tourism activity that is developed around indigenous attraction themes, but in which indigenous people themselves have little or no controlling interest (Cultural Dispossessed), tourism activity can cause huge negative impacts on the indigenous group (Butler and Hinch, 1996, p.10).

The framework for indigenous tourism

Indigenous tourism occurs within the context of a global tourism industry that is dominated by non-indigenous actors. Even this global industry is part of a broader environment which influences and in turn is influenced by non-indigenous and indigenous tourism activities (Butler and Hinch, 1996). This interaction of the indigenous tourism industry with the broader environment is also characterized by the temporal (past, present, and future) and spatial (origin, destination, and linkages) dimensions of the environment (Figure 2). Both of these dimensions provide the context in which causal relationships exist (Butler and Hinch, 1996). The following literature review of indigenous tourism is based on two general contexts. One is the issues associated with local control and the synergies and tensions that exist between the indigenous and global tourism industries. The other concern involves relevant issues found in the broader environmental context in which all tourism exists. The factors within this external environment may have particularly strong influences upon outcomes of indigenous tourism, including those associated with the economy, culture, physical environment, social-demographics and politics. These factors are largely beyond the control of either the indigenous or global industry, but help determine the success of the industry (Butler and Hinch, 1996).

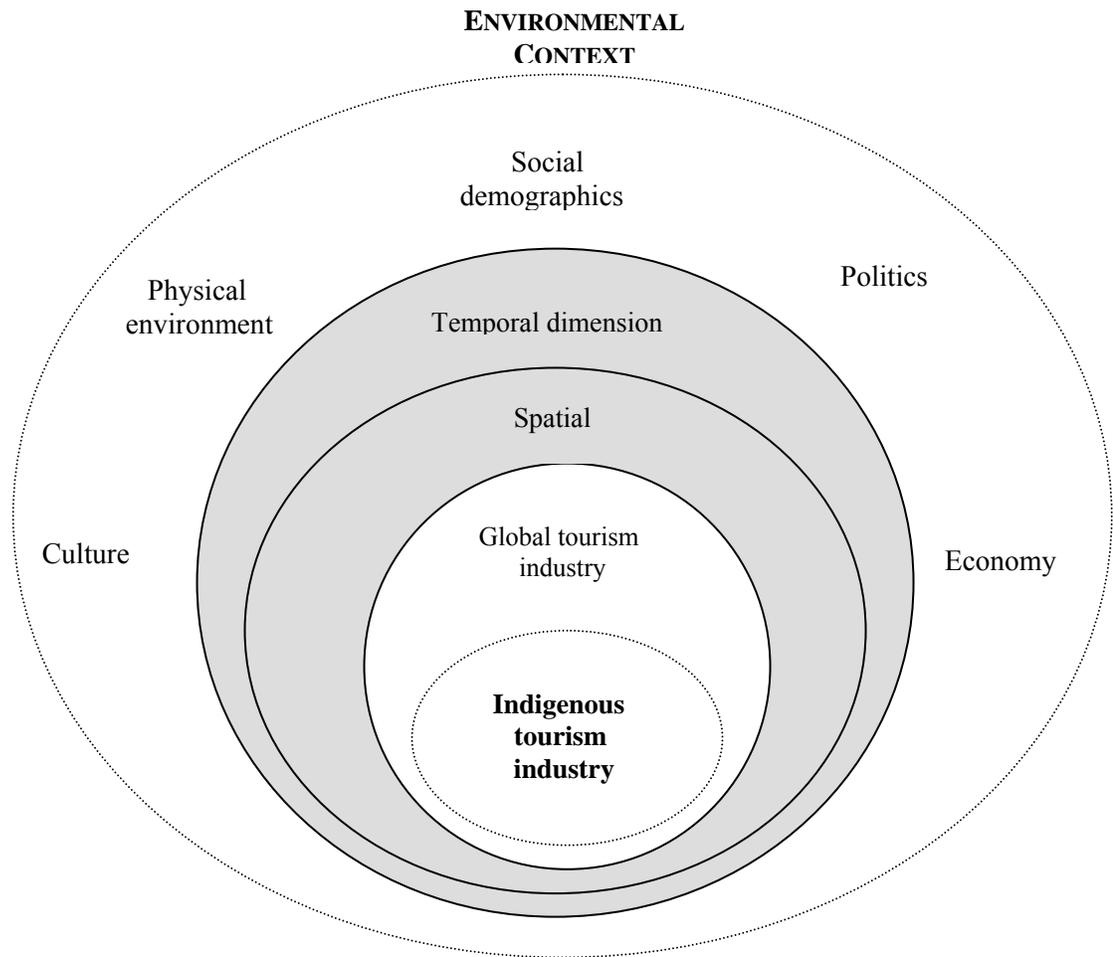


Figure 2-2: A Framework for Indigenous Tourism

Source: Butler and Hinch, 1996, p.12

The development option

Wall and Long (1996) provided an example that showed indigenous peoples in Bali who have exercised both ownership and management control of tourism income while offering an indigenous cultural experience (Cultural Controlled), although this came with some costs, including functional and social change in homes and lifestyles. In this case, the indigenous peoples were not passive respondents to external tourism development, but became, by choice, active participants. They determined the scale at which they would be involved in tourism and, to date, have been able to maintain a significant measure of control over the level of

involvement and the necessary changes to physical structures and lifestyles. Similarly, Cukier (1996), in a study of tourism in Bali, examined one of the most common reasons for involvement in tourism development, that of employment. In contrast with the images from more developed countries where tourism employment includes low pay, low skill requirements, and associated low prestige, she noted that tourism jobs in developing countries may be seen as more prestigious than traditional manual activities. Further, these jobs often pay more than traditional ones, and may represent rare opportunities for women and thus enable their empowerment and advancement. These benefits may be particularly true in the informal sector of the economy, which in many developing countries is of major significance. As with other aspects of tourism, however, costs are involved, as relocation to tourism development areas may be necessary, and traditional activities may suffer from an inability to compete with tourism for the labour force.

Another example is the work done by Grekin and Milne (1996) who found that the influx of tourism expenditures is one of the few sources of new money into very small Inuit communities and, as such, local residents have been willing to utilize traditional knowledge and expertise to tap into this source. The landscape, its wildlife and the cultural artefacts of the local residents in the Canadian Arctic are all highly attractive to limited numbers of tourists. The limited size of the market has been important in keeping pressures on the indigenous population to a level which has proven to be manageable and acceptable. While tourism *to* the Arctic is still primarily externally controlled and managed, tourism *within* the Arctic has a high degree of local involvement, especially in the areas of artefact production and guiding. The apparent approval and success of tourism in several communities, however, has been tempered by local concerns over external issues and perceptions. These include: 1) opposition to the traditional Inuit harvesting of wildlife by animal supporters in Europe and elsewhere, which has made some locals reluctant to become involved in tourism; and 2) an apparent lack of interest by some visitors in local culture and, thus, a lack of cultural contact between the visitor and visited populations. Grekin and Milne (1996) raise concerns about the need for increased linkages between sectors of the economy and additional incorporation of local input into the management of tourism to and in the communities if benefits are to be maximized. Gillespie (1988) found a similar situation in Australia. He emphasized that when assessing the economic benefits of tourism, the economic costs are frequently overlooked.

One potential cost is the reduced aboriginal access to the land utilized by tourists. When tourists continue to participate in hunting, gathering and fishing activities to varying degrees, Aboriginal peoples' rights to carry out these activities are not well protected. Moreover, aboriginal people are reluctant to participate in such activities within view of tourists both for safety and public relations reasons.

Gurung *et al.* (1996) provided a third example, which emphasized the role of indigenous peoples in Nepal as brokers and filters in the tourism development process, incorporating local skills and knowledge. They also reported that there is an inability to maximize economic benefits to local communities and a need to increase the opportunity for expenditure to be made directly to local residents. Further, they noted that tourism employment offers one way of maintaining the viability of local communities by providing a source of income and employment in the area for young people. However, it is a select group of the locals, in this case young males with specific attributes and abilities, who benefit directly. They pointed out that as tourism increases in magnitude and frequency, it may become necessary for locals to move from primarily serving the needs of tourists to adopting a more proactive role in safeguarding local resources and culture from the effects of tourism.

The above cases of Cukier, Grekin and Milne, and Gurung *et al.* all belong to the minor 'Culture Dispossessed' category in which indigenous experiences are offered but with only limited local control. In contrast, Stanfield (1996) provided an example of 'Diversified Indigenous', which is legalized gaming on Indian reserves in the United States. Many of the local residents see this form of tourism as providing the first realistic opportunity for them to gain control of their own economic fate through development of employment in casinos on reserves. In this specific case, however, the opportunity has come about not through the development of tourism directly, but through legal and constitutional arrangements which provide the indigenous people with a unique opportunity.

The turbulence of development

The cases described above are generally positive, despite the presence of some potential negative implications. The following examples, on the other hand, indicate the problems and difficulties which can arise as a result of tourism development and provide some clues as to

which aspects of tourism development may be expected to create turbulence and possible conflict among indigenous groups.

One issue is that of external domination of tourism and, through this, the imposition of requirements on the local populations. They experience tourism being introduced into their communities but remain basically under external control with respect to key aspects such as the rate, scale and type of development (Butler and Hinch, 1996). Hall's (1996) discussion of Maori involvement with tourism illustrates the issue that legal challenges to traditional arrangements and claims for compensation for past wrongdoings or mistreatment pose opportunities for both participation in tourism development and for continued conflict over such development or non-development. New Zealand has experienced substantial growth in tourism in recent decades and the official government policy is for continuation of such a trend. As part of its appeal, New Zealand has long promoted the cultural attractiveness of its indigenous people, the Maori. Increasingly, however, there have been demands for major changes in the legal and constitutional arrangements pertaining to Maori claims for related compensation, including re-negotiation of the major treaty. Tourism is an important element in this process, and access to land and to resources is a key issue in this discussion. Hall illustrates how changing attitudes over control of resources, and hence development, can cause divisiveness within local communities and between indigenous and other populations.

Similarly, Sofield (1996) found that foreign investors in tourism development in a Third World country (Solomon Islands) may encounter difficulties arising out of inter-cultural misunderstanding and /or insensitivity to local value systems. What appeared to be a sensitive and appropriate procedure to secure agreement from local communities for development changed with different ownership and control, and by the manipulation of procedures by individuals, to a process totally unacceptable to elements of the local community. The host community, particularly if it is traditionally oriented, may experience difficulties in adjusting to the situation of accelerated modernization that tourism development usually introduces. Involvement in tourism on a major scale inevitably means involvement with the materialistic and legalistic procedures of western approaches to development and, in many cases, this can lead to disillusionment and conflict. In this case, the development resulted in the host villagers not only being physically alienated from their land and their ancestors, but also psychologically distanced from their heritage. The continuum of interaction with their

ancestors was interrupted, and the trauma of this and the resultant depth of resentment towards the developers were never fully understood by the foreign interests. Understanding of internal as well as external political arrangements and clarification of the often vague appreciation of land and resource ownership and control are essential if difficulties and conflict is to be avoided in traditional societies.

Rudkin and Hall (1996) provided another example of the failure of the driving force from foreign donors, investors, academic institutions, consultants and conservation groups in the Solomon Islands. Ecotourism is a form of tourism often held up as highly appropriate in scale and nature for indigenous communities and it also can contribute to the conservation of biodiversity through the reservation process. However, in some cases, it can be inappropriate and creates problems for local populations, particularly if there are questions of who has appropriate authority in areas being considered for development. Contrary to conventional wisdom that often argues that local control is always best in the context of tourism development, Rudkin and Hall revealed the difficulties that can arise if traditional leaders or power brokers abuse their positions of authority. In the case they analysed, claims of lack of local consultation over development led to opposition to development and demonstrated the range of contradictory opinions about the appropriateness of development which can emerge within and between different levels of government and stakeholders. If development is not appropriately grounded, benefits may accrue in such a manner as to reinforce existing inequities, exacerbating existing divisions and potentially creating new conflicts. Rudkin and Hall (1996) indicated that in order to understand how development initiatives which maximize economic, environmental and social objectives can be implemented, it is necessary to understand the cultural and political milieu in which a tourism project occurs.

Finally, Cohen (1996) provided an extreme example of the 'Cultural Dispossessed' (Figure 1) which occurs when native people are exploited by other populations and are treated like animals in a zoo - fed, stared at and then left, representing the most extreme 'others' (primitive savage) that are visited by tourists. The stereotyping of native peoples for marketing is often a key to their appeal. Although tourism may be viewed as being easier and better than the alternatives open to them for economic gain, the situation here is that tourism utilizes the indigenous peoples for its own ends.

Conditions of positive outcomes

Outcomes tend to be successful when indigenous people can choose to become involved in tourism, to varying degrees, rather than having tourism forced on them, and where their involvement has maintained or achieved a significant level of control, and when they play active, as opposed to passive roles in the operation of the industry (Butler and Hinch, 1996). Local communities can take advantage of tourism development occurring in or near to their location, and succeed in manipulating the form and level of tourism to meet their own needs. De Burlo (1996) provided a good example of 'Cultural Controlled'. He discussed ways in which the Sa manipulate tourists and the tourism industry through their control of the *gol* because of western desires and stereotypes of Melanesians. *Gol* is a ritual which expresses and celebrates the qualities of sacred ('hot') power linked to male activities, such as yam production, the grade-taking ritual and (formerly) war. *Gol* also acts as a political weapon against neighbouring groups and outsiders (de Burlo, 1984; Jolly, 1982, cited in de Burlo, 1996, p.257). The Sa people have retained a resilient sense of cultural identity and perceive this cultural strength in terms of their own history of opposition to outside agencies of change. Ethnic tourism has strengthened this commitment of traditional people in their dedication to their customary lifestyle. Such cultural resiliency "reflects a world view that is not easily threatened or profoundly disturbed" (Weiner, 1988, p.27, cited in de Burlo, 1996, p. 273). The primary tourist attraction is controlled and limited in its accessibility, with the constraints and operational procedures determined by the Sa themselves. Having learned from unfortunate previous mistakes in dealings with outsiders, they maintain a state of tension over their traditional activities. Tourism is accepted on their terms, partly because it serves to bolster the people and their beliefs against the Christian missions. In this case, tourism is used to reach their defined ends.

While Butler and Hinch (1996) noted that indigenous culture is an indicator that can be used to understand indigenous tourism and the above example provides some understanding of "culture controlled", there is still much to be done. For example, there is a need to better define indigenous culture (handicrafts, "traditional lifestyles", "traditional knowledge") and from whose perspective, to determine how to evaluate whether a specific tourism product can fully represent indigenous culture and how to examine whether such a product is good or bad to indigenous people. Moreover, although the above overview provides insights into the

advantages and disadvantages of tourism as a development strategy for indigenous communities, these insights are mainly based on non-indigenous perspectives. More research into indigenous views of tourism should be carried out to remedy this situation.

2.4 Appropriate and Sustainable Forms of Tourism Development

Based on the disadvantages identified above, this section will move away from a focus on some of the problems related to tourism development by creating a list of considerations for appropriate and sustainable tourism development for indigenous communities. It will begin by discussing issues of sustainable tourism development and provides concepts and approaches which could offer promising prospects for addressing if and how indigenous people could become involved in tourism.

2.4.1 Sustainable Development

Sustainable development was first discussed in the 1960s with the advent of the green movement and the term came into common parlance with the publication of the report by the World Commission on Environment and Development (1987) entitled *Our Common Future* (commonly known as the Brundtland report). It was given further recognition with the United Nations sponsored conference on the environment held in Rio de Janeiro in 1992. The most frequently quoted statement from the Brundtland Commission is that “sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.” (World Commission on Environment and Development 1987, p. 43). The definition has two key concepts: (1) needs, especially the needs of the poor people; and (2) limitations imposed by technology and social organizations on the environment’s ability to meet present and future needs.

Sustainable development can be viewed as an oxymoron, with ‘sustainable’ implying enduring and existing in perpetuity and ‘development’ suggesting change, or a progression from an existing situation to a new, ideally superior state (Wall, 2002). A major problem with sustainable development is its ambiguity and subsequent vulnerability to interpretation and employment on ideological grounds (Weaver and Lawton, 1998). Several authors think that the general definitions of the term “sustainable development” are important, but they do not

tell us what actions are needed to achieve such development in practice (Butler, 1999; Chamber, 1988; Wall, 1997).

Some advocates of sustainable development may stress sustainability and forms of human existence that will not exceed capacities or do not deplete natural capital, and that can be maintained indefinitely, while others emphasize enhancement of livelihoods and environments in ways that will improve the lot of disadvantaged people and species. However, conservation practices and long-term perspectives are difficult to adopt by those extremely poor populations who do not know where their next meal is coming from (Wall, 2002). Other complicated questions include: “what is to be sustained?” and “what is development?” For the first question, one might ask whether it is the environment, the economy, the way of life of a people, or all of these things that are to be sustained simultaneously (Wall, 2002). Sustainable development is sometimes seen as reflecting a tension between economy and environment, and this was the dominant dilemma addressed by the Brundtland Commission (WCED, 1987). However, there may be other dimensions that require sustenance, such as culture (Butler, 1998; Wall, 1997). The difficulty of discussing cultural sustainability is understandable since culture is not static and changes over time. However, since cultural survival is a priority for indigenous peoples, the cultural and social components of sustainability need to be addressed.

The definition of development has broadened in scope over time. Telfer (2002) has reviewed the literature on development in a tourism context thoughtfully and concisely. Initially, its interpretation focused mainly on economic growth (Todaro, 1994) and later incorporated social, ethical, and environmental considerations (Ingham, 1993) as well as local empowerment (Wall, 1993a). There also have been evolving discussions concerning the merits of top-down and bottom-up approaches to development, and whether people should be the objects or subjects of development. The latter perspective places control of the development agenda into local hands (Wall, 2002).

The general response to the concern about whether or not a particular policy or activity is sustainable has been the development of indicators. Much of this work has adopted a top-down approach in which international agencies have espoused sets of indicators with supposed wide applicability (World Tourism Organization, 1996). Nonetheless, such sets usually require modification at the local level, both because of different environmental,

economic and cultural circumstances, and also because of differing local priorities (Wall, 2002). This suggests that sustainability indicators may be best developed at the local level through involvement with local stakeholders, reflecting both their aspirations and incorporating local knowledge, yet this is an approach that has yet to receive wide adoption (Wallace and Pierce, 1996). Even with the establishment of indicators, it is probably not possible to say with certainty whether a given policy or plan is sustainable; however, they are required for the implementation of monitoring systems and to inform judgements on whether an initiative is likely to move the system in the direction of sustainability (Wall, 2002).

To assess and combine economic, environmental and socio-cultural measures in sustainability assessments is another difficult task, partly because they are measured in different ways. For instance, economy may be measured in dollars, environment through such indicators as species diversity, and socio-cultural matters through responses to questionnaires. Aggregation of such diverse measures to one simple indicator is full of challenges (Wall, 2002). In most cases of indigenous communities, due to their subsistence culture with strong connections to the land, environmental degradation could have social and cultural implications and the relationships are not linear. It is even more difficult to determine if the culture of a population is sustainable, because it continually changes over time.

Sustainable development has been criticized on ideological grounds as promoting maintenance of the western capitalist system, as being too ambiguous, and as being a concept that tries to do something for everyone by tinkering at the margin of the economic systems that originally created the problems the concept is supposed to help address (Wood, 1993, cited in Wall, 1997). Nevertheless, the ambiguity of the term potentially permits flexibility and fine-tuning to meet the needs of different places and cultures, encourages greater consideration of the environment, and more effectively integrates environment and economic matters in decision making by encouraging dialogue between individuals with different perspectives (Wall, 1997). The concept is also in line with the community and participatory emphasis of much tourism literature (Wall, 1997). It also advocates holism and an appreciation of the interconnectedness of phenomena. Furthermore, humans have often been viewed as being separate from nature, which is there for humans to exploit, manage and control. Sustainable development implies that ultimately humans and environments are indivisible (Wall, 1997).

2.4.2 Sustainable Tourism

Based on the general definition of sustainable development from the Bruntland Report, McMinn (1997) suggested that the term “sustainable tourism” (development) simply limits the meaning to those particular elements associated with tourism. Such a description is vague and makes people question its value. As Wall (1991) has pointed out, *Our Common Future* (WCED, 1987) does not make any reference to tourism and tourism resources, and there has been confusion and disagreement over what the principles of sustainable development really are in the context of tourism and how they may put into practice (Wheeller, 1993; Clarke, 1997; Stabler, 1997). This is because applying principles relating to the global environment to any single sector (tourism) is unrealistic and sustainability, in that sense, is unachievable (Butler, 1998). The complete set of impacts of any activity can never be identified except on a global scale because of the issue of external leakages. Arguing that tourism in a specific location is sustainable is frequently misleading and optimistic at best (Butler, 1998). In addition to the problem of scale, time should also be considered. We have very little idea of the ‘needs’ or even the true preferences of current generations for tourism (e.g., how to balance the ‘needs’ of existing potential tourists against the needs of local populations for resources and space), and no reliable idea of the needs of future generations, on which sustainable development is supposed to be based (Butler, 1998).

It is a questionable point whether, and in what form, tourism might be a sustainable activity. Although certain forms of tourism have been regarded as being sustainable, especially those soft /green /eco /responsible / ‘alternative’ forms of tourism, in reality there are no empirical data to support such a claim (Butler, 1993). Butcher (1997, p.28-29) provided two good examples of such doubt. Opposition to the displacement of the nomadic Masai, to make way for Kenya’s national parks, and to the erosion of the traditional Masai way of life has become something of a *cause célèbre* in sustainability circles. The needs of the Masai are seen by proponents of sustainable tourism as being best met by preserving the status quo. Gurgung and De Coursey (1994), writing on a sustainable tourism project in Annapurna, Nepal, commented that “...village youths are easy prey to the seductiveness of Western consumer culture as tourists are laden with expensive trappings such as high tech hiking gear, flashy clothes, cameras and a variety of electronic gadgetry” (p.179). But what is

really so wrong in aspiring to own a camera and wear fashionable clothes? Clearly the indigenous people sometimes have less ‘respect’ for their own culture than tourism academics would wish. Such static concepts of culture would seem out of place as applied to western societies, but have become commonplace in analyses of less developed countries (Butcher, 1997). Such cultural relativism involves a rejection of the notion of human progress as embodied in the sustainability paradigm and is likely to hold back humanity from facing up to and solving the problems of poverty and underdevelopment. It is hence a far bigger problem than some of the troublesome by-products of unplanned tourism development (Butcher, 1997).

Several authors have indicated the necessity to distinguish between the terms ‘sustainable development’ and ‘sustainable tourism’ (Butler, 1993, 1999; Hunter, 1995; Nelson, 1993; Wall, 1993a). This is because under the dominant tourism-centric paradigm of sustainable tourism development, sustainable tourism may be thought of as “tourism which is in a form which can maintain its viability in an area for an indefinite period time” (Butler, 1993, p.29). Such a definition is concerned with protecting the immediate resource base that will allow tourism development to be sustained (Hunter, 1995) and with promoting an ‘authentic’ meeting place for peripheral rural areas immune to change (Aronsson, 1994). This is a very narrow view due to the following points: firstly, it assumes that tourism is the only way of encouraging development towards sustainability. Second, it ignores the possibility that tourism might be introduced as another economic option for the whole existing livelihoods system and, through proper interaction with other economic activities, might contribute to the local goals of sustainable development. Third, given the reality that culture, society, and environment change constantly, the idea of immunity to change may facilitate stale stereotypes and an incorrect image of indigenous people. Based on the above arguments, a working definition of sustainable development in the context of tourism proposed by Butler (1993, p.29) is as follows:

Tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and wellbeing of other activities and processes.

The above definition acknowledges that tourism is unlikely to be the sole user of resources and that a balance must be found between tourism and other existing and potential activities.

In other words, trade-offs between sectors may be necessary in the interests of the greater good (Wall, 1997). Therefore, the planning of tourism cannot be done in isolation and “it is important to take into consideration the relationship between tourism, other activities and processes, and the human and physical environments in which tourism is taking place” (Butler, 1993, p.29). For the purpose of this study, it is emphasized that tourism should be planned in association with other sectors and economic activities to promote overall sustainable development. As Wall (1997) indicated, diversity, whether it be in economy or biology, is likely to promote rather than detract from sustainability. Hunter (1995, p.156) provided principles of sustainable tourism development encompassing a number of fundamental features. Sustainable tourism development in the both short and long term should:

meet the needs and wants of the local host community in terms of improved living standards and quality of life; satisfy the demands of tourists and the tourism industry, and continue to attract them in order to meet the first aim; and, safeguard the environmental resources base for tourism, encompassing natural, built and cultural components, in order to achieve both the preceding aims.

2.4.3 The Concept of Sustainability

If tourism development is to be a viable force in the future economy, it must be sustainable and use resources wisely and should not grow in an area at the expense of other sectors. The broad notion of sustainability used here encompasses ecological, economic and cultural parameters. The economic and cultural components of sustainability are of particular interest with respect to aboriginal participation in tourism. The former requires a long-term aboriginal commitment to maintaining economically viable tourism ventures. The latter emphasizes that the integrity of the cultural product that is being marketed is not eroded in the longer term (Altman and Finlayson, 1993). When discussing sustaining the integrity of culture, it is important to keep in mind that culture and society are not static. As Mowforth and Munt (2003, p.99) indicated, the relationships within a society, the mores of interaction, the styles of life, the customs and traditions are all subject to change through the introduction of visitors with different habits, styles, customs and means of exchange. Even if the society survives, its culture may be irreversibly altered. Culture of course is as dynamic a feature of human life as society or economy; so the processes of cultural adaptation and change are not assumed by all in all cases to be a negative effect. If ‘authentic’ culture is promoted in the face of

commercialism, it reflects a lack of an expectation of growth, and implicitly accepts that these societies are “going nowhere” (Altman and Finlayson, 1993). It is also important to note that the ecological, economic and cultural components of sustainability are obviously very interdependent, and sustainability requires the achievement of a balance between being economically viable, the resilience of cultural integrity and social cohesion, and the maintenance of the physical environment (Altman and Finlayson, 1993). Furthermore, the benefits and costs of tourism development should be widely distributed in communities. If not, conflicts might exist between those who gain more benefits from tourism and those without. Whether the establishment of appropriate institutions, such as communal resource management or management in common based on the culture of reciprocity and sharing, can be set up in communities to reduce such conflicts is in need of future research.

In order to achieve such goals, indigenous communities must have the opportunity to participate in the planning and operation of the tourism industry and in making decisions for their own future. As Brohman (1996) suggested, the appropriateness of tourism development should be measured according to the changing interests and conditions in the host community and the development should conform to the long-term interests of the majority over an elite minority’s short-term goals. For indigenous groups specifically, cultural control is crucial. This means that the involvement of indigenous people can be used to help to maintain and control tourism development, so that they can play active rather than passive roles in the operation of the industry. The conditions need to be created under which indigenous societies can exercise self-determination so that they can retain the largest measure of autonomy and power of decision making over their own affairs on their own land (McIntosh, 1999). The best scenario is that those involved are using their unique, often traditional, knowledge and expertise to provide cultural experiences to tourists and acknowledging their role as stewards of the environment, while being able to maintain a lifestyle which has not undergone major modification to meet the requirements of the tourism industry (Butler and Hinch, 1996). Moreover, it is important to provide an environment conducive to fostering linkages between tourism and other sectors of the economy. Reflecting the above ideas, three main themes will be addressed. The first is sustainable livelihoods, the second is scale and control of development, and the third is cultural preservation and rural development.

2.4.4 Sustainable Livelihoods

As considerations for sustainable forms of tourism development are proposed, it is important to ask the following questions: what is to be sustained?, for whom?, under what conditions?, and by whose decision? (Butler, 1992). It has been argued that the view of tourism as an “exogenous force” impacting upon a static destination area is too simplistic because indigenous communities may not be passive recipients of tourism: they may encourage, resist, or even participate in the development process (Wall and Long, 1996). Tourism is a dynamic industry and can go through an evolutionary process which may lead to decline (Butler, 1980; 1993). The concept of sustainability tends to assume that development projects will not fail, as Pearce (1988) stated so simply, “making things last,” whether it is an economy, ecosystem or a culture (V. Smith, 2001). However, increasing the sustainability of a system is not equivalent to maintaining that system in its current form because such attempts can contribute to the eventual overthrow or reform of those practices (Robinson *et al.*, 1990). The goal is not to increase the reliability (resistance to breakdown) of the systems being considered, but to increase their resilience, or capacity to recover from disturbance (Holling, cited in Robinson *et al.*, 1990, p.40). Therefore, it is important to discuss tourism’s adaptive capacity. Nelson (1993, p.19) stated the following:

This process is probably the most poorly understood part of the planning and management process for tourism, or for that matter, other human activities. We simply do not understand well, nor have we studied systematically and thoroughly enough, how we actually adapt to change. Indeed, in the classical rational management approach there is kind of built-in denial that the adaptation process occurs, except in the rather formal sense of feedback after testing and monitoring of a project, program, or alternative selected by scientific and professional means.

The development of a better understanding of the adaptive capacity of tourism must not, however, be isolated from all other forms of economic activities. It is vital to set it into the context of place characteristics, which both condition and are conditioned by economic, socio-cultural, political, ecological, institutional and technical forces that are exogenous and endogenous as well as dynamic, because that context has a vital role to play in prospects for sustainable outcomes (Cater, 2002). Based on the above arguments, a sustainable livelihoods (SL) approach is proposed.

Sustainable livelihoods and adaptive strategies

In contrast to previous environment and development thinking about sustainable development, SL is a *people-centred* paradigm which emphasizes the inherent capacities and knowledge systems of rural and urban publics, and is focused on community level actions (Chamber, 1986; UNDP & Wanmali, 1999). Consensus that has built up around the notion of sustainable development, with a focus on livelihood security, recognizes that it is necessary to begin in the place where the poor are now, with the resources they currently control, and the knowledge and skills that they already have (Chambers, 1988). “Livelihoods” is a more tangible concept than “development”, easier to discuss, observe, describe and even quantify. According to Chambers and Conway (1992, cited in Scoones, 1998, p.5), the definition of SL is:

A livelihood comprises the capabilities, assets (including both material and social resources) and activities required for a means of living. A livelihood is sustainable when it can cope with and recover from stresses and shocks, maintain or enhance its capabilities and assets, while not undermining the natural resource base.

The two main ideas of SL are adaptive strategies and participation and empowerment. Adaptive strategies are defined as “the changes and adjustments people make in their livelihood systems in order to cope under difficult circumstances” (Helmore and Singh, 2001, p.3). They are based on local knowledge, combining traditional knowledge with appropriate elements from contemporary or external knowledge, assimilated into the community over time. A key feature of the SL approach is the recognition that the root of all human development and economic growth is livelihoods - not jobs per se, but the wide, infinitely diverse range of activities people engage in to make their living. In addition to activities, livelihoods consist of assets, defined as four different types of capital: human (e.g., knowledge, skills, creativity, adaptive strategies), physical (e.g., buildings, roads, machinery, crops /livestock), natural (e.g., land /soil, air, water, forestry /vegetation), and social capital (e.g., governance structure, decision-making power, community groups, culture). Livelihoods also depend on entitlements, such as support of family or clan members that can be called upon in an emergency (Helmore and Singh, 2001). Everyone’s livelihood is made up of activities, assets, and entitlements, together with the short-term coping mechanisms and long-term adaptive strategies that the person employs in times of crisis so that in adjusting to hardship, loss and change, they can maintain a livelihood (Helmore and Singh, 2001). Adaptive strategies can be

made more productive and more sustainable with the application of a little contemporary knowledge, technology, financial services or government policies. Understanding the current livelihood activities, assets and entitlements of a community or individual naturally provides the best guide to understanding how their livelihoods can be made more productive and more sustainable (Helmore and Singh, 2001).

The SL approach inherently reveals the multi-sectoral character of real life, so that development work is better able to address actual problems as they exist at the village level. This approach also integrates environmental, social and economic issues into a holistic framework, which is an opportunity to promote the sort of cross-sectoral and cross-thematic approach that should be the hallmark of development work (Helmore and Singh, 2001; UNDP and Wanmali, 1999). The attention of the SL approach is being directed toward the ways in which local people can seek to meet basic and ongoing needs for food and shelter, as well as security and dignity, through meaningful work, while simultaneously striving to minimize environmental degradation, accomplish rehabilitation, and address concerns about social justice (Walker, Mitchell and Wismer, 2001).

Sustainable livelihoods framework

Based on above reasoning, Scoones' sustainable livelihoods framework (Figure 2-3) is chosen to guide the analysis of the diverse positive and negative consequences that different types of tourism can have on people's asset base, portfolio of activities, the specific outcomes which they seek, and their influence over external organizations (Ashley, 2000). Using the framework, tourism can be examined in the cultural context of indigenous places and people, which both condition and are conditioned by dynamic economic, socio-cultural, political, ecological, technological and institutional forces. The *vulnerability context* of indigenous communities frames the external environment in which indigenous people exist. People's livelihoods and the availability of assets are fundamentally affected by critical trends and events (e.g., policies for tourism development) as well as by shocks (e.g., typhoons) and seasonality – over which they have limited or no control. The factors that make up the *vulnerability context* also have a direct impact upon the options that are open to them as they pursue beneficial livelihood outcomes. It has to be noted that not all the factors listed in the

framework are negative or cause vulnerability (DFID, 1999). For example, policies of indigenous tourism development may be beneficial to indigenous people.

Sources of *livelihood capital* are livelihood building blocks. “The ability to pursue different livelihood strategies is dependent on the basic material and social, tangible and intangible assets that people have in their possession” (Scoones, 1998. p.7). If indigenous individuals, households, and/or communities adopt (or do not adopt) tourism as one of their livelihood strategies, the examination of a combination of livelihood assets used to pursue diverse tourism activities can help to identify requirements and prerequisite of different kinds of tourism. Some might reflect indigenous people’s strengths (e.g, dance and singing as cultural capital), while others might reflect their weaknesses (e.g., a lack of financial capital to build accommodation units).

Under the framework, when assessing the role that tourism is playing in the *livelihood strategies* of two indigenous communities, tourism can be placed in the local overall livelihood spectrum to identify whether any linkage exists between it and other sectors of the local economy and how tourism can be made to better fit in with existing livelihood strategies.

The framework gives particular emphasis to the component of *institutions and organizations* because they bind together the processes of combining livelihood resources to pursue various strategies and to realize different livelihood outcomes. Structures and processes mediate the complex and highly differentiated process of achieving a sustainable livelihood (Scoones, 1998). Identification of the links between inputs, outputs and flows of livelihood resources, actors, and trends in the social environment helps to identify whether tourism, in what form, and through what institutional processes and organizational structures, might strengthen or weaken local *livelihood assets*, contribute to or undermine *livelihood outcomes* and alter the *vulnerability context*.

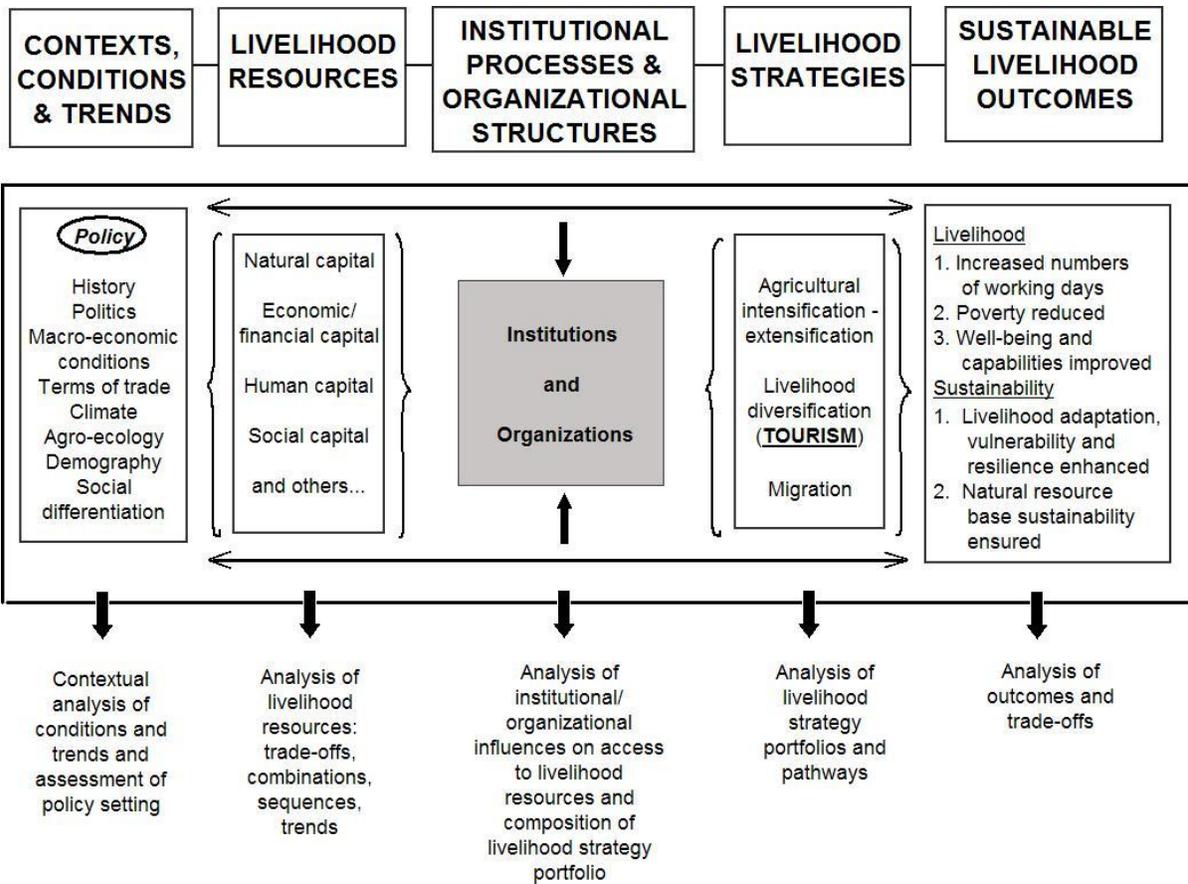


Figure 2-3: Sustainable Rural Livelihoods: A Framework for Analysis

From Scoones, 1998, p.4

Participation and empowerment

The concept of participatory development was formulated as a reaction to the development policies of the 1970s that fostered relationships of economic dependency on government and donors. The communities targeted by these “top-down” development policies were not acknowledged as legitimate stakeholders in their own development process. Realization of the shortcomings of this paradigm led to the popularization of participatory development, in which facilitators focus on a community’s assets and strengths rather than its needs. As a result, a sense of equality, rather than inferiority, develops between villagers and development workers (Helmore and Singh, 2001). Adaptive strategies are regarded as being rooted in local knowledge; therefore, facilitators must first develop an understanding of the community’s knowledge, then bring in their technical know-how and contemporary knowledge to supplement what the community already knows (Helmore and Singh, 2001). In order to overcome facilitators’ preconceptions and make transformative and participatory development happen, they need careful training. Indigenous communities need training too, because the ravages of history have frequently stifled individual initiative, confidence and self-reliance. Community consciousness-raising increases a community’s awareness of its behaviours and experiences. The purpose is to help villagers look at themselves in order to discover how they have internalized their social and cultural reality and how they can explore new options (Helmore and Singh, 2001).

The 1996 Human Development Report defines *empowerment* as “the expansion of people’s capabilities - expansion that involves an enlargement of choices and thus an increase in freedom.” (UNDP and Wanmali, 1999). An empowerment strategy aims to initiate a learning /organizing process that enables local communities in urban and rural areas to: (a) define and set their own goals and objectives; (b) assess the implications of options available to them; and (c) assume responsibility for actions to achieve their agreed-upon objectives. At the micro-level, people can be empowered and have a greater sense of ownership over a particular initiative (or process) if they are actively involved in the identification, preparation, implementation, monitoring and evaluation of that initiative (UNDP and Wanmali, 1999).

Livelihood diversification

If indigenous communities decide to incorporate tourism as one of their livelihoods in order to achieve sustainable development, tourism will be a form of livelihood diversification into the non-primary economic sector. Ellis (1997, p.5, cited in Hussein & Nelson, 1998, p.4) defined livelihood diversification as “the process by which rural families construct a diverse portfolio of activities and social support capabilities in their struggle for survival and in order to improve their standards of living.” Such diversification can have many advantages and tourism can become: (1) a means to enable accumulation (e.g., income) for consumption and investment; (2) a means to help spread risk; (3) an adaptive response to longer-term declines in income entitlements, due to serious economic or environmental changes beyond local control; and /or (4) a means to take pressure off fragile lands and increase household incomes for purchase of additional food or payment of school fees. The last advantage features a non-farm livelihood pattern using human (i.e., labour) and economic (i.e., employment related to tourism) assets as a means to *further improve* the financial /economic asset base (i.e., income, savings, investment) as well as other dimensions of their existing stock of human assets (i.e., health, education) (Hussein and Nelson, 1998; UNDP & Wanmali, 1999).

Livelihood diversification provides indigenous people with greater opportunity to determine what they can do with and without tourism on their land. As V. Smith (1996) stressed, indigenous peoples cannot separate from their natural and cultural contexts. Appropriate involvement in tourism, desired by the involved indigenous populations, will also bring changes in uses and values of resources and activities. These need to be reviewed and understood in the local cultural and natural setting where they occur, and through indigenous minds rather than being assessed solely by external agencies. It is important that local communities can have the opportunity to evaluate their own resources (human, physical and economic), to assess their past, present and future needs and resources, and to identify their strengths and weaknesses before evaluating any decision to become involved in tourism. Only when communities understand themselves and their abilities in their own terms can they begin to evaluate decisions relating to external features such as tourism.

Although the SL approach can help to promote sustainability in its broadest sense because it aims to understand livelihood systems and to promote four essential characteristics (economic efficiency, social equity, ecological integrity, and resilience), the issue of cultural

sustainability still needs further exploration under such an approach. “Sustainability” can be a difficult concept to agree on in practice, even among experts. More importantly, there may be significant differences of judgement between local practitioners and external experts over what practices or which livelihoods are “sustainable” (Rennie and Singh, 1995).

2.4.5 Scale and Control of Tourism Development

If tourism is to fit into a community, appropriate types and scales of tourism development need to be employed (Hall, 1999; Wall, 1993b). The key decisions about involvement have to be made by the locals themselves and they should retain a significant level of control over the type, rate and level of tourism development that their communities are experiencing. The concepts of scale and control of tourism development are interrelated and the literature reveals that large-scale, outsider-owned establishments result in high leakages, while small-scale, locally-owned establishments with internal control result in smaller leakages (Twing-Ward, 1999). As Sofield (1993) suggested, it is crucial to: (1) create an environment in which village-based resources, both human and physical, can be utilized for indigenously-owned and operated tourism development; (2) support the capacity of the local community to obtain and retain control over the venture; (3) maintain a high degree of authenticity to enhance the socio-cultural experience of the visitor; and (4) protect the host community from adverse tourist-resident ratios that could undermine village stability. The above concepts suggest that appropriate development would be small-scale, village-based tourism utilizing a limited range of intermediate technology. Such tourism by its nature would be “soft”, culturally and environmentally oriented, with an emphasis on traditional experiences for the visitor. With the combined characteristics of smallness and limited technology, management of the venture would not require imported non-village skills and the authenticity of the experience would be enhanced. Wall and Long (1996) found that Balinese homestays based on the layout of the traditional housing compound have facilitated conversion to supplementary tourist uses and enable residents of Bali to become involved in tourism as entrepreneurs rather than employees. Given the dynamic aspect of the tourism industry, another perspective on control is for indigenous communities to establish long-term monitoring programs to ensure that unexpected adverse effects can be reduced and that the expected benefits result (Branch *et al.*, 1984).

Wall (1993b) emphasized the necessity to devise a typology of tourism that will permit the matching of tourism types to resource capabilities. A tourism typology includes attraction types (cultural, natural and recreational), location (interior and coast), spatial characteristics (nodal, linear, and extensive), and development status (highly developed, developed, developing). Attractions like cultural sites with religious significance are more sensitive to high levels of tourist development as compared to recreation sites such as beaches. Appropriate tourist infrastructure can be developed on the coast to accommodate large number of tourists and to divert high pressure from the interior. Accommodation type is considered to be a key element in the tourism system with implications for “characteristics of tourists, the built environment, economic impacts, degree of local involvement, and critical environmental and sustainability factors including land, capital, water, energy and waste disposal systems” (Wall, 1993b, p.52). Wall also suggested that the quantities and types of accommodation can be used to regulate the level and types of use in different tourist areas and he advocated a mix of tourist types and associated accommodation types both between tourist areas and within tourist areas.

2.4.6 Cultural Preservation and Rural Development

A primary motive for supporting nature-based tourism is its potential to assist in nature conservation. This can only be successful if local communities obtain clear, sustainable and adequate benefits from the presence of tourism (Eagles, Bowman and Tao, 2001). The conservation philosophy that has traditionally been used in the past in the creation of national parks, natural monuments and scientific reserves has been a closed protected model. Parks and protected areas have been designed on the assumption that they should be free from human influence (Brechin *et al.*, 1991). McLaren (1999) commented that the way conservation is practiced in the west is viewed as being conservation-for-development and that concept is not necessarily consistent with indigenous traditional views of guardianship and protection. In this type of model, very little consideration is given to the interests of communities in and around protected areas (Kim, Kang and Kim, 1999). Often, no efforts are made to involve local people in the planning and management of the area, even though many regulations imposed by the park staff impact on the livelihoods of the resident (Eagles, Bowman and Tao, 2001).

In the context of protected areas, it is important to adopt the notion that “human populations have evolved as an integral part of an ecosystem, such that their continued interaction in the natural environment (grazing, farming, hunting, etc.) is necessary to maintain desired ecological conditions.” (Brechin *et al.*, 1991, p.7). The idea of an integrated perspective on natural and cultural heritage preservation is proposed. It has to be noted that cultural groups for whom this is an important issue are concerned not so much about being kept statically in what has been termed “enforced primitivism”. Rather, they desire the freedom to choose for themselves the extent to which they preserve the old or assimilate the new, and at what pace. Conservationists must work to preserve the right of self-determination, rather than some romantic ideal of primitivism. This entails dynamic, adaptive cultural change, including changing material culture, technology and resource utilization patterns (Brechin *et al.*, 1997). For instance, cultural preservation areas along with biological reserves can be created so that tribal peoples are able to maintain their traditional ways of life.

The second idea is rural development, which is emphasized in IUCN’s Commission on Ecology (1980b) and the *World Conservation Strategy* (1980a) to indicate the importance of alleviating rural poverty as a key consideration in conservation planning. In contrast with conventional top-down and basic human needs approaches, a bottom-up approach to rural development strategies is proposed, which stresses an appropriate scale of improvements in existing, productive, local economic systems (Hough and Sherpa, 1989). It encourages self-sufficiency, using sustainable resource bases for subsistence and small-scale market development. It entails full participation and control by local people in planning for and implementing rural development projects (Cernea, 1985; Korten and Klauss, 1984, cited in Brechin *et al.*, 1991).

The above two ideas can be integrated into the policy for and planning of protected areas. These notions facilitate tourism development that focuses on nature preservation and eco-development. It is important for park agencies to develop approaches and methods that more actively involve resident peoples in the planning and decision-making process. Various degrees of decision-making power need to be shared if the broader interests of indigenous people are to be considered along with economic development goals (Brechin *et al.*, 1991; Eagles, Bowman and Tao, 2001). In situations where local control of tourism operations is possible, local communities will benefit more directly from tourism development in and

around the protected areas, and potential impacts on the natural, social and cultural environment are more likely to be considered from the perspective of the local communities (Eagles, Bowman and Tao, 2001). Other approaches to involving indigenous communities include social impact assessment, conflict management and co-management (Brechin *et al.*, 1991).

The concept of full participation in the planning, decision making and operating of tourist schemes, either in the context of parks or not, can be understood in Pretty's typology of participation (Table 2). It describes the seven types of involvement ranging from *passive participation*, in which virtually all the power and control over the development or the proposal lie with people or groups outside of the local community, to *self-mobilisation*, in which the power and control over all aspects of the development rest squarely with the local community. The range of types allows for differing degrees of external involvement and local control, and reflects the power relationships between them. For local people, involvement in the decision-making process is a feature of only the *interactive participation* and *self-mobilization* types, while in the *functional participation* type most of the major decisions have been made before they are taken to the local community. The only forms of local participation that are likely to break the existing patterns of power and unequal development are those which originate from within the local communities themselves. These forms are most likely to be adopted by an indigenous community for developing tourism enterprises. Such participation allows them to monitor and exercise important controls on the pace of development.

Table 2-2: Pretty's Typology of Participation

Typology	Characteristic of each type
1. Passive participation	People participate by being told what has been decided or has already happened. Information being shared belongs only to external professionals.
2. Participation by consultation	People participate by being consulted or by answering questions. Process does not concede any share in decision-making, and professionals are under no obligation to take on board people's views.
3. Bought participation	People participate in return for food, cash or other material incentive. Local people have no stake in prolonging technologies or practices when the incentives end.
4. Functional participation	Participation seen by external agencies as a means to achieve their goals, especially reduced costs. People participate by forming groups to meet predetermined objectives.
5. Interactive participation	People participate in joint analysis, development of action plans and formation or strengthening of local groups or institutions. Learning methodologies used to seek multiple perspectives and groups determine how available resources are used.
6. Self-mobilization	People participate by taking initiatives independently of external institutions to change systems. They develop contacts with external institutions for resources and technical advice they need, but retain control over resource use.

Source: Pretty and Hine (1999, cited in Mowforth and Munt, 2003, p.215)

2.5 Summary

The literature reveals that positive outcomes of tourism development for indigenous people will most likely happen when indigenous people are directly involved in and control tourism activities and their culture serves as the essence of the attraction. However, are cultural expressions as tourism resource equivalent to cultural control? Addressing culture only as an attraction implies meeting the demand of tourists and overlooks how indigenous people perceive tourism and whether tourism is accepted on their terms, especially when tourism is a relatively new activity. It is necessary to learn the meaning of tourism from indigenous people's perspectives, which is rarely examined directly in the literature. The identification of weaknesses in the concepts of sustainable development and sustainable tourism provides legitimacy for using the sustainable livelihood approach to examine the roles that tourism plays in indigenous people's daily lives, not only because culture is embedded in daily life but also because of the need to identify whether any linkages exist between tourism and other sectors of the economy and how tourism can better fit in.

The sustainable livelihood approach that is adopted in this research project is further described in chapter 3, along with research strategies for examining issues of tourism development in indigenous communities from indigenous perspectives.

CHAPTER 3

RESEARCH APPROACH

3.1 Introduction

This chapter outlines the research approach. The preceding literature review indicated the significance of including an indigenous perspective in the research. Therefore, Section 3.2 starts with the introduction of etic and emic approaches, the concept of research authenticity and the role of researcher, which provides a basis for the use of qualitative methods for the research. Section 3.3 describes the conceptual and theoretical framework that is also used as an analytical tool. Section 3.4 describes the detailed process that was used to gather information in the field and provides a justification for the selection of research sites. In Section 3.5, sampling decisions and various qualitative methods of data collection are considered. Section 3.6 outlines three levels of data analysis. Ethical considerations are described in Section 3.7. Section 3.8 reflects on the challenges and limitations of the research approach that was adopted.

3.2 Strengths and Weaknesses of Research Methods for Understanding Indigenous Perspectives on Tourism

Social science research, including tourism-related research, has employed quantitative research methods extensively in intercultural contexts. The theoretical justifications for this type of research have their foundations in western-based research methodologies, which tend to focus on process and content (Berno, 1996). Even though they are adapted and validated for use in other cultural contexts, their lack of appropriateness is often apparent, particularly to the native population under consideration (Berno, 1996). Much cross-cultural research in tourism places primary focus on the *content* of the research objectives rather than the cultural *context* in which tourism occurs.

3.2.1 Etic and Emic Approaches to Tourism Research

This situation of the confrontation of indigenous culture with a Western conceptual framework can be viewed in terms of etic and emic approaches to cross-cultural research. The

term 'etic' refers to concepts and ideas that are common across all cultures. 'Emic', on the other hand, refers to those concepts which are culture-specific (Brislin, 1993). When conducting cross-cultural research, it is imperative that one does not make the assumption that one's own etic-emic concepts are necessarily true for other cultures (Berno, 1996).

Within the study of tourism and its impacts, the assumption of 'tourism' and 'tourist' as etic concepts is often made. Contemporary tourism is, however, primarily a western phenomenon, although this is changing, and it relies on discretionary income, time and the association of 'travel' with 'leisure' (Leiper, 1990). As such, non-western societies do not necessarily have equivalent counterparts (Berno, 1996).

3.2.2 Effects on Research Authenticity

The emic versus etic conceptualization of tourism and tourists is significant for the study of the impacts of tourism on indigenous peoples. When the term 'tourist' is used cross-culturally, it is important to define it from an emic position reflecting the indigenous peoples' understanding of both their own forms of travel and of western tourism (Berno, 1996). It is important to discern how the indigenous peoples define and conceive 'tourist', particularly in relation to the role of the researcher (Berno, 1993; Lanfant, 1993). If a non-indigenous researcher is conceived as being a 'tourist', 'visitor' or 'guest' by the local indigenous communities, it will raise the consideration of research authenticity, which is the capability of the researcher to elicit unbiased and genuine answers from the respondents (Pareek and Rao, 1980). Authenticity differs from validity. "Whereas validity refers to the ability of the research instrument to measure what it is supposed to measure, authenticity is the total capacity to elicit unbiased and genuine responses from a subject, and as such, depends on factors other than the research instrument" (Pareek and Rao, 1980). Research authenticity can be influenced by four sets of factors: (1) interviewer-related factors such as interviewer affiliation, image, cultural distance, status and interview bias; (2) the interview and its settings, including thematic relevance, cultural relevance, social desirability, length and structure; (3) respondent-related factors such as private-public opinion gap, previous experience, saturation and response set; and (4) cultural factors including courtesy norm and reticence (Pareek & Rao, 1980).

Being aware of a variety of intervening factors in an interview process, measures were taken to lessen the effects of the factors. To reduce cultural distance and to be as culturally sensitive as possible, prior to embarking on the field work, literature on the history of indigenous peoples in Taiwan from the seventeenth to the mid-twentieth century and their current status, tourism and indigenous people, sustainable development, sustainable tourism, and sustainable livelihoods were reviewed to establish knowledge of indigenous people and related issues. A research proposal including research topic, purpose, objectives, approach, and interview protocol was developed and received ethics approval from the Office of Research Ethics at the University of Waterloo.

Before entering the research sites, several scholars in Taiwan who are familiar with the research sites and have extensive experience of working with indigenous people were consulted to obtain their advice. Through their referral, contacts were made with local people and the indigenous villages were entered successfully. In order to become acquainted with Tayal and Cou people, I joined a research project sponsored by World Vision in Taiwan, an NGO that has assisted indigenous children and the development of indigenous communities for a long time. I teamed up with a Cou researcher to shift my affiliation and challenge a potential image of me as ‘only’ a graduate student from Canada. Staying in two Cou residences for a half of a year enabled me to build trust with local residents and reduced the cultural distance and interviewer bias. Interviews were often conducted at or close to respondents’ residences or places of work in settings that respondents were familiar with in order to put them at ease and to reduce bias in replies. The majority of interviews were conducted as one-to-one conversations to prevent distractions from the presence of a third person. Interviews usually started with the questions “What do you do to make a living?”; “What activities do you do and why?” Which are most important, which are most preferable?” The respondent was always told in the beginning of the interviews that they could refuse to answer any question or terminate the interview if they wished. The lengths of interviews varied. I ceased the interview process if the respondent expressed fatigue or was interrupted for other important personal tasks.

With regard to respondent-related factors, a number of research projects had been conducted in Shanmei previously, so that some villagers started to develop research fatigue. Several villagers expressed their unwillingness to fill in mailed questionnaires because they

felt that those who mailed the questionnaires without showing up in person to understand the real situation of their lives were insincere. Several respondents expressed approval of my way of collecting information which was mainly through qualitative methods. Clearly, the previous experience of respondents with filling in questionnaires and interviews influenced their attitudes towards my interviews. Chashan, on the other hand, did not have this problem. With regard to the influence of cultural factors, staying with local families for six months and accepting locals' hospitality (rice wine, wild boar meat) gradually decreased the distance between the researcher and respondents. Section 3-4, later in this chapter, provides detailed information on how the researcher dealt with the factors that influence research authenticity.

3.2.3 Quantitative Methods in the Field: Formality, Structure and Utility

Quantitative methods, particularly structured interviews or questionnaires, can provide detailed demographic information which can be used both to describe a sample as well as to provide variables for further analysis. However, although the content of a questionnaire and the associated sampling methods may have been adapted and validated for use in another cultural context, and may validly and reliably assess the concept of 'tourism' as conceptualized by a Western researcher, without careful consideration of the specific cultural context in which the research is to be undertaken, resulting data can lack both validity and reliability (Berno, 1996).

3.2.4 Qualitative Methodology

Qualitative methods, particularly in-depth interviews and participant observation, allow for additional prospects of ascertaining the emic conceptualization of tourism, which in turn results in its appropriate operationalization (Berno, 1996). In a culture with an oral tradition, subjects are more comfortable with verbal discourse which allows them to explain and illustrate their thoughts and feelings rather than with a structured interview. It enables the researcher to clarify the conceptualizations of the terms under investigation and allows for adaptation to incorporate the emic perspective. Scope for understanding the perceived role of the researcher and the subsequent effects on the data also exists (Berno, 1996). When assessing the effects of tourism, particularly psychological effects, qualitative methods avoid

the artificiality of requiring subjects to quantify or categorize their answer into a pre-existing framework, or of having to quantify often complex phenomena. They allow subjects the opportunity to identify their answer within the framework of their own culture (Berno, 1996).

On the other hand, qualitative methods in the field, such as interviewing and participant observation, might be considered as obtrusive measures. Non-obtrusive qualitative methods, such as content analysis can be enlightening and enrich the emic understanding of the effects of tourism (Babbie, 1992).

Analysis of secondary data allows for investigation of evidence of socio-cultural effects related to tourism. Government publications and documentation, such as incomes and employment statistics, can be linked theoretically to the growth of tourism to gain an historical representation of what some of the socio-cultural changes associated with tourism may have been. The information can then be augmented by qualitative interviews with both key informants¹ and the general population. Conversely, information gained through interviews or participant observation can be further validated by using these non-obtrusive measures. Qualitative measures need not be entirely non-quantitative. Methods such as content analysis and analysis of secondary data can, and often do, incorporate statistical techniques (Berno, 1996).

Qualitative methodologies can be used to assess complex social and psychological phenomena in a culturally appropriate manner as well as accounting for and incorporating the emic stance of a population. Because of the greater time and resources needed, qualitative methods may result in data of limited breadth, but of high validity. Based on the reasoning described above, qualitative methods were used for data acquisition.

3.3 Research Approach and Design

The research was done essentially as an ethnographic case study with a longitudinal time frame. Harris (1968) defined *ethnography* as description and interpretation of a cultural or social group or system. I examined the Cou tribe's observable and learned patterns of behaviour, customs, and ways of life. As described by Creswell (1998), the process involves prolonged observation of the group through participant observation in which I was immersed

¹ Key informants can be defined as “people who are particularly knowledgeable about the inquiry setting and articulate about their knowledge – people whose insights can prove to be particularly useful in helping an observer understand what is happening and why” (Patton, 2002, p.321)

in the day-to day lives of the Cou people and through one-on-one interviews with Cou members (please refer to section 3.4 for details). Information gathered in the extensive fieldwork helps to develop a portrait and is required to ascertain the “cultural rules” of the Cou tribe.

I consider the case study as a research strategy that allows an exploration of a “bounded system” through the examination of two research sites (multi-site study) within a tribe over time and through detailed, in-depth data collection involving multiple sources of information rich in context (Creswell, 1998; Yin, 2003). This bounded system is bounded by time and place. The multiple sources of information collected include observations, interviews, and documents which will be described in detail in section 3.5.

The examination of the consequences of tourism ranges from livelihoods before and during the introduction of tourism in the past to the present and emerging trends and issues. This approach was adopted in order to trace changes in livelihood strategies over time and to identify what events and influences were significant for producing new values, orientations and livelihood strategies in the indigenous, case-study villages (Walker, 1998). The examination of the evolution of livelihood strategies is the main focus of the study. Livelihood strategies are defined as “an organized set of life-style choices, goals, and values, and activities influenced by biophysical, political /legal, economic, social, cultural, and psychological components and designed to secure an optimum quality of life for individuals and their families or social groups” (Walker, Mitchell and Wismer, 2001, p.298). Probing change through a livelihood strategy lens helps to reveal how local people have adapted to past change, develop new goals, aspirations or orientations and, furthermore, to determine what their future livelihood strategies are for themselves and their children. It also provides a means for examining social change in terms of a process of development and in terms of a result from policies programs or projects, both of which are important to the assessment of social impacts (Burdge *et al*, 1978; Gold, 1978; Long, 1996). The most important questions are: a) what are the values, beliefs and practices of indigenous communities which support or impede adaptive strategies? b) what cultural changes have occurred over time and how have these impacted on values and livelihood systems? (Rennie and Singh, 1995), and c) how do residents view and interpret tourism and what aspects of tourism do they incorporate into their culture?

A focus on livelihoods offers a useful perspective on whether tourism can enhance indigenous people's lives and helps to identify the wide range of impacts – direct and indirect, positive and negative – that matter to them. It shows how tourism's possible contribution to livelihoods can be enhanced by adjusting decisions on what is developed and how, in ways that reflect indigenous people's livelihood priorities (Ashley, 2000). It contrasts with narrow assessments of local benefits focusing only on jobs and cash income. The use of the 'Sustainable Livelihoods' framework (Figure 2-3 in Section 2.4.4) was used to assess the diverse positive and negative impacts that different types of tourism can have on people's asset bases, portfolios of diverse activities, specific outcomes that they seek, and their influence over external organizations (Ashley, 2000).

3.4 Field Work

Data were collected from July 2004 to January 2005 in Taiwan. During the field work period, it was not necessary to hire a translator or research assistant because the researcher is fluent in Mandarin and English. The majority of the residents in the communities could speak fluent Mandarin, except for the elderly. During public occasions, the middle-aged people usually translated what the elders said. During individual interviews, however, senior people who could not express themselves well in Mandarin did not always have others present to translate, which created significant limitations in obtaining elders' perspectives. From mid-July to the end of July 2004, contacts were made with residents of two indigenous villages, Smangus and Cinsbu (the language of the Tayal² tribe) in Xingzu County (Figure 3-1). Through referral by a master's student at Providence University in Taichung, I was able to contact directly a resident in Smangus who had recently entered the master's program in ecology at Providence University. Due to the long distance and a lack of convenient transportation to Smangus, arrangements were made for me to be met in Taipei by two villagers when they came to Taipei to deliver peaches. They drove me to Smangus on July 30 and I stayed for four days on my first visit. On July 31, I gave an information letter to the chief, describing the purpose of my research and how it would be conducted, while three elders were also present. The letter was circulated to the elders. On August 1, 2004, I attended Sunday service in Smangus

² Tayal is one of the two sub-tribes of Atayal. The Tayal sub-tribe can in turn be divided into Seqoleq and Tseole groups. Smangus belongs to Seqoleq.

Presbyterian Church. At the end of the gathering, I was invited by the pastor to introduce myself. I talked briefly about my research and informed those present that some of them would be contacted for interviews in the near future. During this period of time, I met a number of key informants including the chief, elders, and the pastor, and developed a good rapport with villagers. Direct observation and brief discussions with villagers for four days provided me with a general understanding of their current livelihoods and the tourism development process that had occurred over the preceding 10 years.

On August 4, 2004, through the introduction of Dr. Lin, an Assistant Professor in the Ecology Research Institute at the Providence University who has had extensive work experience with tribes in Taiwan, I had an opportunity to attend a meeting in Cinsbu and met the previous pastor who was a councillor of Xingzu County, the current pastor, and several villagers.

In order to increase my familiarity with the existing situation of the indigenous tribes in Taiwan, an arrangement was made for me on August 10 to become involved in conducting a survey of indigenous community industry development. The sponsor of the study was

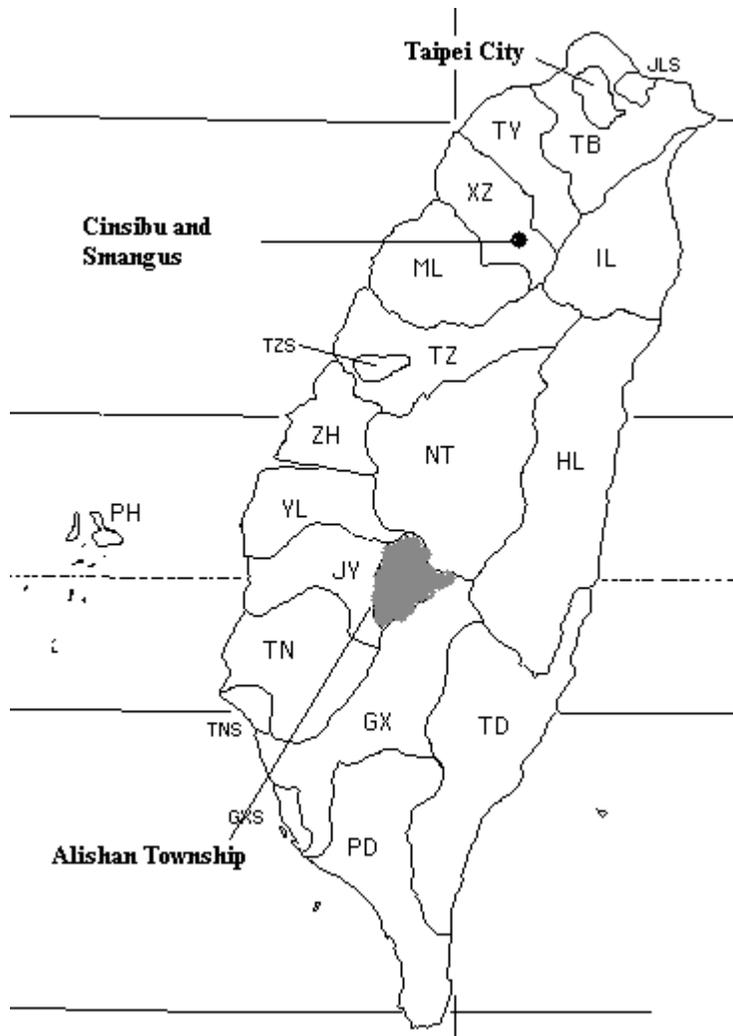


Figure 3-1: Research Locations of Field Work from 2004 to 2005

Note. Alishan Township includes seven Cou villages (Laiji, Leye, Dabng, Tefuye, Lija, Shanmei, Xinmei, and Chashan) and five Han villages. Detailed locations of each Cou village are shown in Figure 4-3 (in Section 4.2.3).

World Vision in Taiwan. Dr. Lin had been commissioned by World Vision to develop a list of indicators to evaluate industry development in indigenous communities with respect to the following aspects: 1) community organization, 2) evaluation of the ecological environment, 3) social capital, 4) community education, 5) level of local control over industry, 6) channels of production and marketing, 7) systems of production and marketing, and 8) core values. Eight indigenous villages had been proposed for investigation, evenly distributed in the northern, middle, southern, and eastern parts of Taiwan. One of the eight was my proposed research site (Cinsbu, Hsinchu County). Three others (Xinmei, Chashan and Laiji, Jiayi County) were located fairly close to another proposed research site (Shanmei). There were six researchers, including myself. The other five were either indigenous people or had had rich working experiences with indigenous communities. On August 14, 2004, I was able to get a ride from the pastor of Smangus and stayed at the village until August 19, 2004. I attended a meeting of Smangus Tribal Development Association and carried out nine individual interviews. Interviewees included the chief, elders, tour interpreters, and the family members from two households. Each participant was notified that their participation in interviews was voluntary, that anything they shared with me would be confidential and that their names would not be utilized. I also always asked for permission to record interviews and to take photographs.

On August 20, 2004, I attended a meeting regarding the World Vision project on indigenous community industry development. At my request, I was paired with a team member Jyh who was Cou from Shanmei and had held several positions in both government and non-government organizations (e.g. the Chairman of the Association for Taiwan Indigenous People's Policies (NGO), a member of the National Council for Sustainable Development, a member of the preparatory committee of Cou Indigenous Council (NGO)).

On August 22, 2004, I obtained a ride from one of World Vision's project members to Cinsibu and had 2 interviews with an elder and a female key informant on August 23. I later obtained a ride to Smangus and observed the Tayal Life Experience Camp for four days with 34 Tayal students from different universities in Taiwan³. It turned out that typhoon Aere pounded Northern Taiwan from August 23 to 25 with heavy rain and fierce winds which caused a power cut. To my surprise, not all scheduled activities were cancelled but took place

³ The purpose was to observe the capability of Smangus villagers to hold a large-scale educational activity and to experience Tayal life for myself.

indoors and three substantial meals and snacks were prepared for us. Because of damage to the access road resulting from the typhoon, on August 27, an air force helicopter and rescue team arrived to lift all of the college students at the camp, a number of visitors and me out of the mountains. Originally I wanted to stay, but the villagers insisted that I should leave, considering that it might take more than one month to fix the roads and that I might have a lot of work to do. Later I realised how fortunate I was. Out of several villages in Hsinchu County, Smangus was one of only a few that did not have severe damage; still, two out of four bridges to Smangus had collapsed and the roads to both Cinsibu and Smangus were destroyed. I made several attempts to return but did not succeed due to the difficulty of making transportation arrangements.

On September 2, 2004, my partner Jyh and I started the survey of community industry development for World Vision in Laiji, Xinmei, and Chashan, Jiayi County. The task was closely related to my research objectives and being paired with a local key informant facilitated the making of arrangements for transportation and accommodation, as well as making contact with other key informants, including those in my research sites. The working period took place during September 2004. The workload was not heavy and I was able to carry out my own research at the same time. It was required to have 10 participants from each community, and 30 in total were interviewed⁴.

Through this project, I became acquainted with the Alishan area, three Northern Cou tribal villages, and a number of key informants of the Cou tribe. I came to understand that the distribution of seven Northern Cou villages (from North to South they are Laiji, Leye, Tefuye, Dabang, Lijia, Shanmei, Xinmei and Chashan) was mainly concentrated in the Alishan and Tashan region. A decision was made to focus my research in this region. This not only gave me an opportunity to explore the dynamics of individual tribal communities but also placed my work in a broader context of the Cou tribe. Unlike Cou, Atayal (to which Smangus and Cinsibu belong) is Taiwan's second largest aboriginal group and has the broadest distribution in Northern and Northeast Taiwan. Besides, Smangus belongs to the Seqoleq group of the Tayal sub-tribe of the Atayal tribe. Familiarity with specific individual Atayal communities generally cannot reflect the situation of the Atayal tribe as a whole and vice versa.

⁴ From September 8-18, 2004, I conducted 30 interviews in Laiji, Xinmei, and Chashan for the project of World Vision.

From September 3 to 8, 2004, I stayed at a local residence in Shanmei where my partner Jyh was born and used to live, and conducted my own research. I asked Jyh who was the best person to give the information letter to and he responded that it would be him. Therefore, I gave the information letter to him. The couple with whom I stayed were the aunt and uncle of Jyh and themselves were key informants. The aunt, Mei, was the nurse of Shanmei clinic and knew everyone in Shanmei. She had previously been the general executive of Shanmei Community Development Association. She had been involved in the development process of Danayigu Ecological Park and had gone through the transformation of the community development organizations. The uncle, Huei, was the people's representative of Alishan Township, Jiayi County. He constantly informed me of the significant events in Alishan Township and answered my endless questions.

I briefly described my research project to aunt Mei, and she gave me a list of suggested persons to interview. During this period, I had five interviews with key informants, attended the meeting of the board of directors of the Shanmei Community Development Association (SCDA) and became a student of a class in Cou culture and history under the program of the Cou Tribal University. At the meeting of the board directors of the SCDA on September 8, 2004, I introduced myself to the board chairman and the board of directors, and briefly described my research. I informed them that I planned to attend most meetings and to record the discussions. Later, when I contacted participants for interviews, each of them was first informed about my research and that their participation was voluntary, that anything they shared with me would be confidential and that their names would not be utilized. I then asked if I could record interviews and notified them that they should please let me know if there was any part of the conversation that they did not wish to be recorded.

From September 19 to October 6, 2004, I was in Taipei, transcribing all the interviews and wrote reports on Laiji, Xinmei and Chashan for the World Vision project. Through this process, I realized that Chashan had developed tourism for six to eight years. Although it was only half an hour drive from Shanmei and the majority of the population was Cou, the form of tourism and its development process was totally different from that in Shanmei. I decided to adopt Chashan as my second research site for the following reasons: 1) some studies had been conducted in renowned Shanmei previously, but few had been undertaken in Chashan; 2) Smangus and Cinsibu were inaccessible at the time and having a second research site would

add richness in my dissertation; 3) through the World Vision project, I had developed some understanding of Chashan's current tourism situation and had rapport with key informants in the village, so that probing further in the village would be facilitated.

From October 7 to November 21, 2004, I mainly stayed in Shanmei and worked on my own research, with the couple mentioned above. My sampling approach and geographical boundaries were progressive, evolving as I became more familiar with the environment and was able to assess the number of individuals I had resources to be able to interview (n=51). My interviews followed two principles: the first one was pre-determined, identifying key leaders and village residents who had been involved in the progress of managing local fish stocks and establishing Danayigu Ecological Park as individuals and at community levels; individuals of different gender, age, social status and ethnic groups were sought. Second, Shanmei village is comprised of seven diverse neighbourhoods, each with its own unique geographical, ecological and even cultural characteristics. The majority of tourism activities was carried out in and around Danayigu Ecological Park which is located in neighbourhood 4. Previous research has tended to focus on participants involved in tourism but the majority of Shanmei residents are involved in a variety of livelihood activities in addition to tourism. As a result, certain individuals from each neighbourhood were interviewed to ensure that the data fully represented different voices in Shanmei.

The Fona (Bean of Life) Festival

On November 18 and 20, 2004, I went to the newly completed Cou Aboriginal Cultural Park in Leye village to observe the rehearsal and first performance of the Fona (Bean of Life) Festival sponsored by Jiayi County Government, the Alishan National Scenic Area Administration, the Alishan Township Administration and the Alishan Township Farmers' Association. Prior to the festival, a number of Cou people from the seven Cou villages was hired by the organisers to construct a number of traditional Cou buildings and infrastructure in the Cultural Park.

The genesis of the festival came from Cou elders' concern that the tribe was in danger of becoming extinct. They advocated matching marriages as a plan to increase population growth. The Cou elders discovered "Fona" (Bean of Life), a perennial trailing plant which is fruitful and grows well on barren soil and under adverse circumstances. This plant was therefore offered at the Cou traditional wedding ceremonies as a symbol of holiness and

fertility (Alishan National Scenic Area Administration, 2004b). The festival in 2004 was the third one, but it for the first time it was open for public participation. Fifteen Cou couples were married and the traditional collective wedding ceremony was provided to the couples nationwide. The festival lasted from November 20 to December 18, 2004, and major activities were held on Friday to Sunday including Cou singing and dance performances. Performers were paid by the sponsors.

Seven traditional Cou buildings were constructed to represent the seven Cou villages (according to the current administrative system). Each building was constructed and decorated by the people hired from that village to demonstrate its own characteristics. Some buildings had local artists demonstrating artistic creations, some had hand-made crafts for display and sale, and others were used to introduce the attractions of the villages and to promote tour packages. People who sold food and beverages in the Cou Aboriginal Cuisine Market and the Local Food and Products Market in the park had signed contracts and made agreements with the sponsors to pay \$500 NT (\$20 CAN) as a deposit for having a stall in the markets. They had to attend the stall every day during the festival period even if there were no visitors, otherwise their deposit would be confiscated.

Through attending this event, I met several government officials and scholars who were familiar with Alishan, Jiayi County. Some of them later were chosen to be participants in my study to provide me with a broader perspective on the villages, livelihoods and tourism development issues.

From November 22, 2004, to January 1, 2005, I mainly stayed at the home-stay of the ex-head of Chashan village. While I was carrying out the project for World Vision in September, 2004, since my partner Jyh was very busy with his work schedule, he asked his brother-in-law Lee, the general executive of Chashan Community Development Association (CCDA) and the executive director of Cou Culture and Arts Foundation (TCAF), and his younger sister Lan, the secretary of CCDA and TCAF, to assist me with the project. These two people helped me to identify key informants in Chashan. Therefore, when re-entering Chashan, I started with the ten key informants interviewed earlier. Nan, the layperson of Chashan Presbyterian Church, introduced to me by Lee, later referred me to more participants. Similar to Shanmei, my sampling approach and geographical boundaries evolved after I became more familiar with the environment. Unlike Shanmei's population, which was mainly

Cou with a few ethnic Han households, indigenous people comprised only 69.83% of the Chashan population, including the Cou tribe (approximately 60%) and the Bunun tribe (approximately 10%), while Hoklo⁵ “lowland immigrants” (a subethnic group in Taiwan) comprised the remaining 30%. Given this knowledge, my interviews followed four principles: the first one was to identify key leaders of Chashan organizations, based on the current government administrative system, who had initiated and been involved in Chashan community development. The second was to include individuals from different ethnicities, gender, age, and social status. Third, Chashan village is comprised of five diverse neighbourhoods, each with its own unique geographical, ecological, and even cultural characteristics. The majority of tourism activities were carried out in neighbourhoods three and four. My selection of participants mainly focused on these two neighbourhoods. However, certain individuals from each of the other three neighbourhoods were also interviewed to develop a better understanding of overall livelihood strategies in Chashan and the possible relationships between tourism activities and other livelihoods. This was done to ensure that the data fully represented different voices in Chashan. Fourth, individuals who were directly or indirectly involved in a variety of forms of tourism were observed and interviewed.

After a number of interviews and field observation had been conducted in Shanmei and Chashan, it was realized that the livelihoods of Cou indigenous villages have been mainly dominated by several government organizations in terms of policies, administrative system, programs, etc. As a result, I decided to interview government officials, both in local and central authorities. Interviews with several officials of Alishan National Scenic Area Administration were mainly carried out in December 2004, while interviews with officials of Jiayi County Government and the Council of Indigenous Peoples, Executive Yuan in Taipei were mainly conducted in January 2005.

While the period of September 2004 to January 2005 was the temporal boundary of field data collection, I also collected information through interviews and documentation on

⁵ Hoklo (pronounced *Holo*) refers to an ethnic-cultural group originating in Fujian province, China. A large number resettled in Guangdong province, notably in Hainan and Chaoshan during the Song Dynasty. Much of the population is now in diaspora in Taiwan, as well as other countries such as Thailand, Malaysia and Singapore. Unlike many other Chinese ethnic-cultural groups (for instance, the Hakka) the identity linking the various Hoklo populations and subgroups is not very strong. Many Hoklo people themselves do not know their origin.

events, processes and activities relevant to my research questions that occurred prior to September 2004.

From February 2005 to October 2005, data were analyzed and a number of preliminary results appeared. Further detailed questions were raised. I presented the results in the 9th International Geographical Conference titled “First Nations and the Fourth World: Living Spaces for Indigenous Peoples” at National Taiwan Normal University on November 11, 2005 and exchanged valuable information with a few scholars who have conducted research about the Cou tribe. The second field research period started in the post-conference fieldtrip to Shanmei and Chashan and lasted to mid-December. One-hundred-and-eight interviews were conducted in the two villages with 89 purposively-selected persons with new questions to obtain further detailed information and to check earlier work (member checking). The purpose of member checking was to re-confirm the accuracy of the results with the persons who were interviewed and to ensure that the researcher did not misinterpret the data. Figure 3-1 describes the field research process.

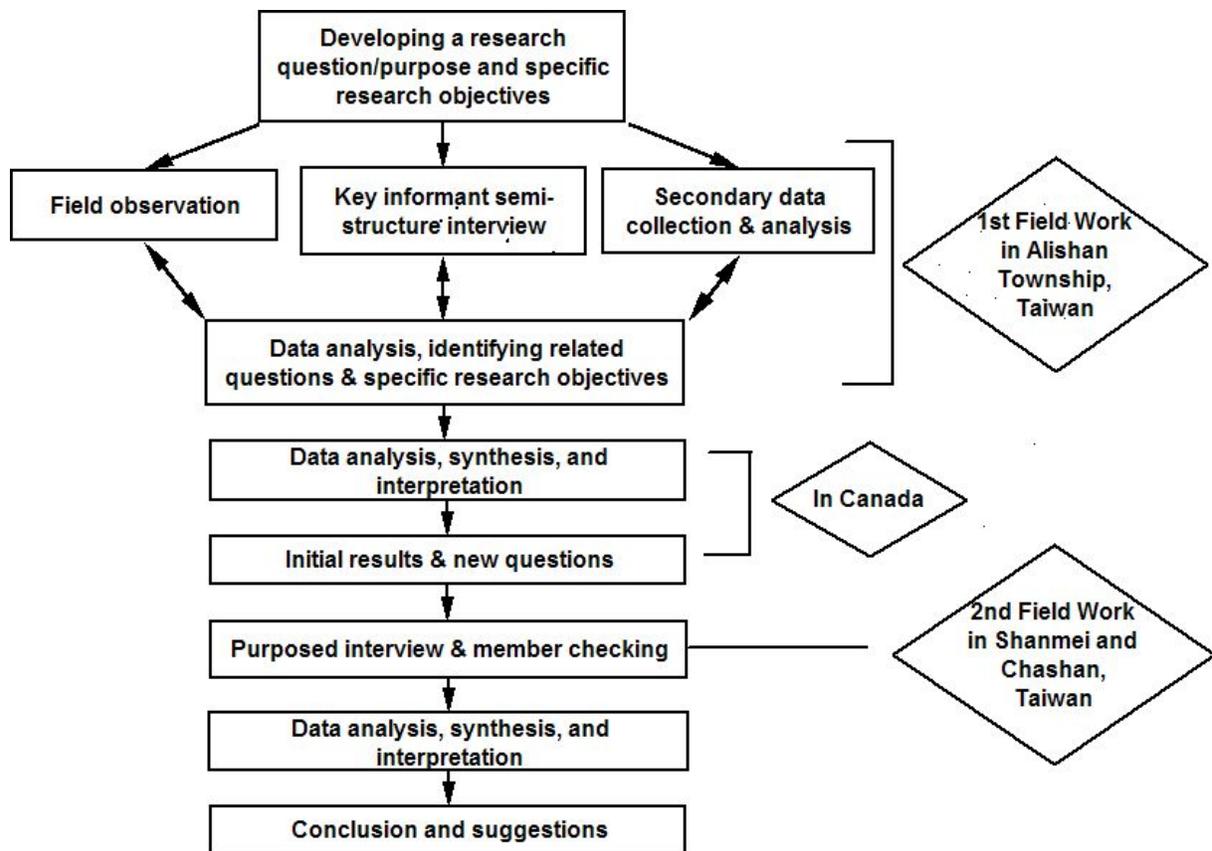


Figure 3-2: Diagram of Field Research Process

Summary

My extended fieldwork, as Patton indicated (2002), involved many mini-or micro-case studies of various units of analysis (individuals, groups, specific activities, specific periods of time, critical incidents), all of which together make up the overall case studies.

Much of the empirical work was undertaken through interviews with key actors. The two research sites were determined because I was able to access them physically and because people were willing to collaborate in the research process. The project of World Vision provided me with the opportunity to become acquainted with Shanmei and Chashan, and I decided to choose Chashan as the second research site, having accessed every Cou village in Alishan area. Their relatively close locations and strong connections enabled me to become familiar with specific Cou communities (i.e., Shanmei and Chashan), reflecting the broader situation of the Cou tribe. The survey result of the project of the World Vision provided rich contextual information for my research and enabled me to have a better understanding of the

demands and obstacles facing the development of industry in remote indigenous communities. However, its small sample size focusing on village key informants did not fully represent the voices of all of the villagers. Being aware of this weakness, when collecting data for my own research, I expanded my interviews objects to include general villagers and a wide geographical distribution. Collaboration with a local researcher and residents facilitated the cross-cultural and interdisciplinary research, with emphasis on building relationships and avoiding western-centric thinking (Tam, 2003). Residents in both Shanmei and Chashan expressed many social, cultural and economic changes induced by tourism development. Thus, ultimately, the Cou tribe became my selected study focus and was accessed primarily through Shanmei and Chashan.

3.5 Ethnographic Data Collection Methods

I used several methods of data collection that are commonly utilized in qualitative research, including direct observation (e.g., taking photographs), participant observation, in-depth interviews, and documentation analysis (Creswell, 1994; Patton, 2002). Direct observation and in-depth, open-ended interviews were my primary means of data collection.

Documentation consisted of written materials and other documents from organizational and program records, official publications and reports, a personal life story manuscript, photographs and memorabilia. Extensive field notes were collected mainly through observations and interviews. The use of multiple methods – triangulation - enabled me to collect different types of data and provide cross-data validity checks (Patton, 2002).

Empirical data collection was always guided by the sustainable livelihoods theoretical framework. Other significant topics that were not identified in the framework emerged as a better understanding of the transformational developmental dynamics emerged. The evolution of Cou cultural structure and the ways in which it guided how things were done in both communities were assessed through observation, interviews, and documentation analysis.

3.5.1 Observation

Data from observations are comprised of detailed descriptions of people's activities, behaviours, actions, and the full range of interpersonal interactions and organizational processes that are part of observable human experience (Patton 2002 p.4). A detailed, non-

judgemental and concrete description of what was observed is referred to as field notes (Marshall and Rossman, 1999).

Writing up of observations and field notes took place in a variety of social settings chosen for study. First, all seven Northern Cou villages (according to the current administrative system) in the Alishan area were visited and photographed. Second, more detailed observations occurred while conducting the survey of community industry development for World Vision in Laiji, Xinmei and Chashan. Third, more systematic observations on physical and human environments were made in Shanmei and Chashan. The physical environment includes geographical characteristics, farm land, scenic spots, style of housing, tourism-related facilities and accommodations, modern buildings and Cou traditional buildings representing significant social, political, and religious meanings, vehicle types etc. The human environment was also observed to identify a variety of activities that people with different age and gender were doing at various times during the day and during both weekdays and weekends, to examine the possible relationship between those activities and various forms of tourism activities, to watch the interactions between local residents and tourists, etc. I made a broad range of observations in order to have a more holistic view. While I stayed with local residents in Shanmei and Chashan for over three months, I actively participated in the life of the village residents which made it possible, as Patton (2002) suggested, to explore both externally observable behaviours and internal states (world view, opinions, values, attitudes and symbolic constructs). This immersion offered me the opportunity to learn directly from my own experience of the setting.

Participatory observation was possible during informal moments and social events and during the classes of Cou Historical and Cultural Study that, most of the time, were held within community. Being a student in the class, I was able to have close interpersonal interaction with about a dozen community members in Shanmei. Through talking with the lecturers and my classmates about their experiences and perceptions, knowledge was gained in the class that can be used to contrast with the information obtained from personal interviews and vice versa, because some of the classmates were also interview participants.

Observations in different settings were affected by the various roles I adopted along the continuum from complete participant to complete observer, and most of the time I was an observer rather than participant. I tried to find a balance between insider and outsider

perspectives but realize that much of the time, as Patton (2002) mentioned, while I simply do not know the meanings or the patterns of residents' daily activities, the insiders are so immersed that they may be oblivious to the fact that patterns exist.

3.5.2 Interviews

Interviews allowed the researcher to gather information on things that could not be readily observed, such as the participant's past and present feelings, intentions, thoughts, and action in other settings and captured direct quotations about people's personal perspectives and experiences (Patton, 2002). A key decision associated with interviews is the prior construction of an instrument (Kirby and McKenna, 1989). Since I already had research questions and a conceptual framework to guide analysis prior to my field visits, when conducting interviews in the field, a cross between Patton's (2002) general interview guide approach and informal conversational interviews seemed to be most appropriate (please refer to Appendix A for a general interview guide). The general interview guide approach includes a list of issues to be covered with each participant, whereas the informal conversational interview approach recognizes that interview questions will change over time and each new interview builds on those already done. Previously learned information was further expanded and moved in new directions by seeking elucidations and elaborations from various participants.

Informal interviews were conducted during the entire period of fieldwork whenever an opportunity presented itself. These interviews ranged in length from ten minutes to over an hour. They often happened in the homes, cars, streets, fields, over meals, and relaxing in front of a campfire. These interviews in casual conversational form increased my familiarization with the villages and enabled me to capture issues of importance to village residents and those involved in tourism. Such interviews were also held with tourists to obtain general ideas of their travel motivations and attitudes towards host communities.

Selection of respondents

Interviews were conducted based on a purposive sampling approach. The logic and power of such an approach rest on selecting information-rich cases for study in-depth rather than yielding empirical generalization (Patton, 2002). Specific individuals for these interviews

were identified, based on the recommendations of the key contact persons of each community and upon the knowledge gained from printed materials before and during field work.

Village key informants

In both villages, key informants were sought and interviewed in order to obtain information on the situation and issues in the village. More specifically, in Shanmei, the issues sought included the initiation and process of protecting Danayigu River, the operation of Danayigu River Ecological Park and, also, village organizations including Shanmei Community Development Association (SCDA) and Shanmei Village Administration were investigated. In Chashan, the knowledge sought included the initiation and process of transforming the village into an aboriginal culture park, various forms of tourism, and the challenges faced by organizations under the state administrative system, including Chashan Village Administration, Chashan Community Development Association (CCDA) and Chashan Leisure Agricultural Area. Later, various aspects of village life and operation, including historical, cultural, political, social and economic information were provided by different key informants based on their expertise in both villages.

In Shanmei, a total of 72 interviews were held with 31 key informants in the first and second field trips. Some individuals were approached more than once to seek clarification. In SCDA, current and previous board chairmen, current and previous general executives, the majority of current and previous board directors and supervisors, current staff, and the head of Danayigu Ecological Park were interviewed. In Shanmei Village Administration, the current and previous heads and previous village affairs officer were contacted. In addition, a people's representative of Alishan Township, Jiayi, a police officer of Shanmei police station, and the nurse of Shanmei clinic were also interviewed. It is important to note that some of these individuals had held different positions at different times.

A total of 55 interviews were held with 24 key informants in Chashan in the first and second field trips. Again, some of these individuals were approached more than once. In CCDA, the current board chair and general executive, several current board directors, and staff were interviewed. In Chashan Village Administration, current and previous heads, the current affairs officer, and the current and previous heads of five village neighbourhood units were interviewed. In addition, the chair of Chashan Leisure Agricultural Area and the minister and the layperson of Chashan Presbyterian Church were also interviewed. It is

important to note that some of these individuals had held different positions at different times and even held more than one positions at one time.

Village residents

Out of 117 interviews conducted in Shanmei in the first and second field trips, 45 were held with 37 village residents. Sampling was distributed in seven village neighbourhood units in order to obtain the overall perspective of the livelihoods of Shanmei and an “ordinary” point of view on issues and challenges faced by individuals and the community. Out of 112 interviews conducted in Chashan in the first and second field trips, 57 were held with 36 village residents. Sampling was distributed in five village neighbourhood units to obtain an overview of the livelihoods of Chashan, various forms of tourism activities, and general concerns faced by individuals and the community.

Government officials, academics, and NGO staff

A total of 14 interviews were held with six government officials, seven scholars, and one NGO staff in both field trip. The Deputy Director and the staff in the Marketing and Services and Planning Sections of Alishan National Scenic Area Administration were interviewed to understand their policy, plan, and the funding distribution for tourism promotion in Alishan area. The Director of the Social Affairs Bureau, Jiayi County Government, who was previously the Acting Mayor of Alishan Township and conducted his Master’s thesis in Shanmei was interviewed with respect to his opinion about the issues of Alishan Cou society and development from a governmental perspective. The Vice Chairman and the staff of the Department of Economics and Public Construction of the Council of Indigenous Peoples, Executive Yuan were interviewed with respect to the nationwide plans and policies regarding indigenous community rebuilding and sustainable development. Three Cou scholars and one Han scholar who has conducted Cou ethnographic research for over 20 years were interviewed due to their Cou perspective and expertise on Cou traditional society, politics, economics, culture, territory, myth and legends, and their understanding of the reasons for the marginalized status of the Cou that is reflected in every aspect of the life within each Cou village. The other three were knowledgeable about tourism in the Alishan area, especially Shanmei and Chashan, and about issues of industrial development (e.g. agriculture, culture, crafts, tourism, home stays) in aboriginal villages. One staff of World Vison was interviewed

to understand the organization's goals and missions for facilitating the development of camilia oil industry in Shanmei and Chashan.

Follow-up interviews

In the course of fieldwork, ideas about directions for analysis occurred and possible themes came to mind. Interview questions and themes were changed or refined. Subsequent follow-up interviews on new themes and to acquire new information with initial participants were held to broaden or clarify my understanding of these new themes. Eleven follow-up interviews were conducted with eight key village informants and villagers in Shanmei; thirteen follow-up interviews were conducted with six key village informants and villagers in Chashan.

3.5.3 Seasonal Calendar

A seasonal calendar was compiled with the help of one villager in Chashan during an interview, and was then verified during subsequent interviews with other villagers in Chashan and Shanmei. The purpose of constructing the calendar is to illustrate the seasonal variation of activities and vulnerabilities including the shocks and seasonality that villagers encounter in order to better understand the livelihoods and lifestyle in the villages.

3.5.4 In-depth Household Case Studies

In-depth household case studies provide more detail on the complexity of household livelihood strategies. The researcher lived in the villages for six months, conducting informal interviews, observing and participating in daily activities, such as hunting, fishing, collecting mountain resources, making handicrafts, making and selling beverages, and interacting with local people in social activities. Such participant observation can provide insights that are not available from other methods.

3.5.5 Secondary Data

Various information on indigenous people and tourism in Taiwan in general and specifically with respect to the research sites was collected.

Government documents and statistics

These documents included planning and evaluation reports on both research sites and other Northern Cou villages in the Alishan area from both central and regional government organizations, eight sets of minutes of Cou advisory committee meetings on Cou cultural and tourism development, policies and plans with regard to indigenous community development, laws and regulations specifically related to reserved land for indigenous peoples, marketing and management of indigenous agricultural and local products, maps of current land use and traditional territory, a census on the Alishan Cou population and its distribution, and related demographic information and guide books.

Archives

As Hill (1993) indicated, archival strategies and techniques constitute part of a repertoire of field research and evaluation. Organizations in Shanmei and Chashan had produced both public and private records. Documents with limited circulation produced by Shanmei Community Development Association consist of board minutes and seven annual reports including the mission report of the current year and the plan for the next year, evaluations of programs, financial and budget records, entrance fee income distribution charts, organizational structure, rules and regulations, name lists of board chairman, board directors, staff, and members. Official documents and statistics submitted for governments were also obtained, such as the number of Danayigu park visitors, projects and plans prepared for government funding, and programs funded by government to boost the community economy. They reveal the things that have taken place before the evaluation and reveal goals, directions and decisions that otherwise would be unknown to the researcher. They also penetrate the past and are particularly useful at getting at adaptive strategies. Non-official documents include private individual biographies, brochures and pamphlets for the advertisement of home stays, guest houses, recreational farms, restaurants, package tours, local products, performance programs and CD albums.

Literature

Relevant academic literature, both theoretical and empirical, was collected from a variety of sources to obtain the information on tourism development and natural resource management on both research sites, Alishan indigenous people's perceptions and attitudes toward the impacts of tourism development, development of indigenous culture, tourism and recreation,

ethnic tourism, impacts of the Cou tribal festival, the ethno-economy and industrial development of indigenous peoples, building a new indigenous community and sustainable development, ethnography of the Cou tribe including Cou myths, history and politics, society and religion, traditional territory, spatial structure of traditional society, wisdom of life, social movements and the self-governance system.

Relevant non-academic literature consists of the information in personal manuscripts and an introduction to Shanmei community development and the problems of the development of Alishan Cou society indigenous people in Taiwan in general.

Newspapers and magazines

Newspapers and magazines provide a valuable source of both historical and current information including retrospective issues of the paper and manifestos concerning the introduction and development of tourism that reflect a more popular and politicized view than academic literature (Berno, 1996; Cukier, 1996). However, the data should not be interpreted as being representative of the ‘average’ resident. In areas with a strong oral, as opposed to written tradition, and /or high levels of illiteracy, information and opinions in newspapers and magazines may represent a small and possibly elite minority (Berno, 1996). For this study, articles relating to indigenous people and tourism and specific research sites in were found in *The China Times*, *Sinorama Magazine* and *The Earth*.

Table 3-1 summarises data-gathering methods, locations of research conducted, and numbers of interviews by neighbourhood units, sex, and age of Shanmei and Chashan from 2004 to 2005.

Table 3-1: Locations of Research Conducted and Numbers of Interviews by Neighbourhood Units, Sex, and Age of Shanmei and Chashan (2004 to 2005)

<i>Observation:</i> 7 Northern Cou villages: Dabang, Tefuye, Leye, Laiji, Lijia, Shanmei, Xinmei, and Chashan								
<i>Interview</i> (numbers of interviews ^b)								
Neighbourhoods	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5^a	Unit 6	Unit 7	Total
Shanmei	22	11	13	15	4	24	28	117
Chashan	21	8	36	41	6			112
	Sex		Age					
	Male	Female	18-24	25-34	35-44	45-54	55 and up	
Shanmei	52	65	2	19	23	49	24	117
Chashan	57	54	0	42	31	27	12	112
Government representatives, academics and NGO staff outside the villages: 14								
<i>Seasonal Calendar:</i> Shanmei and Chashan								
<i>In-depth Household Case Studies:</i> 5 cases in Shanmei and Chashan								
<i>Secondary Data:</i> Government documents and statistics, archives, literature, newspapers and magazines. The data are mainly collected in Shanmei and Chashan, government organizations in Alishan area, Jiayi municipality, universities and the national library in Taipei.								

Note. ^a The numbers of interviews in the unit 5 of both villages are small due to their remote location and less population. ^bPlease refer to Appendix G for the list of interviewees.

3.6 Data Analysis

Data collection and analysis usually occur concurrently in qualitative research (Kirby and McKenna, 1989; Creswell, 1994; Miles and Huberman, 1994 p.12). The researcher must be prepared to modify or completely change planned steps as the research proceeds, depending on the ideas and connections emerging from the data (Miles and Huberman, 1994). These statements reflect my approach to data analysis. From daily analysis during the field work, new ideas and themes were generated and they enabled me to identify gaps in the data and to plan for the next day's activities. All decisions made in a qualitative research process, such as case selection, sampling decisions and choice of data collection methods are analytical ones (Miles & Huberman, 1994).

The sustainable livelihood framework (Scoones, 1998) is used as a vehicle for guiding research and analysis. Three forms of data analysis were conducted to gain three perspectives on the data collected. It started with initial analysis of types /patterns of activity/resource use with a temporal dimension including past, current and emerging trends. Respondents' answers to the research questions were also compared to the information in secondary data about influential events that relate to tourism and natural resource management issues. This

enabled the researcher to contextualize the actions and attitudes of respondents with previous trends and to cross-check information. Second, certain components of the sustainable livelihood framework were emphasized as categories to bring a dynamic element to the analysis. Inputs, outputs and flows of livelihood resources, actors, and trends in the social environment were identified and linked. Under such an approach, tourism can be examined in the cultural context of indigenous places, which both condition and are conditioned by dynamic economic, socio-cultural, political, ecological, technological and institutional forces. Third, more in-depth analysis of similarities and differences of most components in the sustainable livelihood framework were compared individually between the two research sites to identify the Cou people's system of values or world views and institutions.

Three analytical procedures in ethnography were used for data analysis. I started with a detailed description of the Cou tribe, followed by an analysis of the tribe by themes and perspectives, and looked for the meanings of social interaction to enable generalization about indigenous people's social life (Wolcott, 1994). The final product of the effort is an holistic cultural portrait of the tribe that incorporates both the views of the actors in the tribe (emic) and the researcher's interpretation of views about human social life from a social science perspective (etic) (Creswell, 1998)

Under the case study approach, because two cases were chosen, I first provided a detailed description of each case and the themes within the case, called a 'within-case' analysis (Creswell, 1998), followed by a thematic analysis across the cases (i.e., Shanmei and Chashan), called a 'between-case' analysis). More specifically, 'within case' comparison refers to comparing the responses and opinions of stakeholders that are differentiated by age and sex within the case, for example, young people versus senior people within Chashan village. 'Between cases' comparison refers to comparing Shanmei and Chashan villages.

3.7 Ethical Considerations

The participation of the interviewees was voluntary. Permission was obtained to record each conversation and to take photographs. At the outset of each interview, the respondent was notified of the nature of the study, the way they would be involved and how the information gathered would be used. I stressed that anything they shared with me would be confidential and their real names would not be utilized. They were encouraged to let me know if they had

any questions and concerns. A study information letter (Appendix B) prepared by myself with approval from the University of Waterloo Office of Human Research (OHRAC) was given to key informants in both research sites. The letter indicated that anonymity of participants and confidentiality of data would be secured throughout the research period and in the release of the findings. The letter also provides the address and phone number of the OHRAC, which could be contacted directly in the case of concerns. Each participant received a hand-written thank-you card after the field work. To further preserve confidentiality, villagers are identified in the thesis by numbers.

3.8 Reflecting on the Approach

It was a learning process (as it is for everyone) that too often in the interview records I heard myself interrupting participants to agree or disagree with their comments, even challenging the comments by indicating what another person said, or to ask another question when perhaps they were thinking about the initial question. Expressing agreement and disagreement or responding to participant answers has been considered inappropriate in interview data collection (Fontana and Frey, 2000). Also, because I had an informal conversational interview style, not everyone was asked about the same themes, and not all were asked the same questions for specific themes. A great amount of time was spent for eliminating irrelevant information during data analysis. Also, some participants expressed that they would find it better if they could converse in Cou.

CHAPTER 4

HISTORICAL BACKGROUND AND SOCIO-ECONOMIC CONTEXT OF THE STUDY AREA

4.1 Introduction

Alishan, Taiwan, has been known as a scenic spot in the Chinese world since the Japanese Colonial Era (1895-1945). The area was originally settled by the Cou tribe. Following the secession of Taiwan to Japan at the end of the First Sino-Japanese War, Japanese expeditions to the area found large quantities of cypress trees. This led to the development of the logging industry in the area and the export of cypress and Taiwanian wood (*Taiwania cryptomerioides*). A series of narrow gauge railways were built in the area during this time to facilitate the transportation of lumber from the mountains to the plains below. Several new villages also sprouted up along the railway lines. It was also during this time that the first tourists began to visit the area. Plans were even drawn up to incorporate the area into a new national park (Wikipedia, August, 2006).

With the exhaustion of forest resources by the 1970s, domestic and international tourism overtook logging to become the primary economic activity. The tourism industry continued to expand with the completion of the Alishan highway in the 1980s, displacing the railroads as the primary mode of transportation up the mountain. To combat the problems associated with the growing crowds of tourists and expanding tea and wasabi plantations, the area was declared a national scenic area in 2001 (Wikipedia, August, 2006).

In recent years, in particular, the area has been targeted for further tourism development by the national government. The Cou tribe and its culture have been advertised as one of the main touristic attractions (Tourism Bureau, Ministry of Transportation and Communications, 2005, January). For seven Cou villages in the area, especially Shanmei and Chashan villages where this research took place, locally-initiated tourism development has taken place for a period of time. Shanmei has developed tourism for nearly 20 years while Chashan only have tourism experience for about eight years (Shanmei Community Development Association, 2005b). Thus, the area provides excellent opportunities to undertake case studies addressing the overriding research question concerning the role that tourism has played in two Cou indigenous villages' livelihood strategies using the sustainable

livelihood framework as its basis. The purpose of this chapter is to provide an overview of the study area and the Cou tribe, including its traditional social structure, social life, and social and economic vicissitudes from the Japanese Colonial Era to the present. These contexts have been important in shaping and transforming the livelihoods of the Cou over time.

4.2 Cou Tribe

4.2.1 Traditional Social Structure

The Alishan Cou tribe call themselves “Cou” (the “people”). The population is just over 4000. Cou society is a patri-clan system (S.-S. Wang, 1999) and has a graded series of unilateral organizations; each tribe is divided into a few “phratries”; the phratry contains several “clans”; and the clan is in turn divided into a number of “sub-clans”. While sub-clans are all named, this is not necessarily the case with phratry and clan. Below the sub-clan, there are unnamed lineages, the extent of which is rather fluid and which coincides sometimes with a nascent sub-clan (Mabuchi, 1951 p.49-50)¹. Cou ethnic and political territory (*hosa*) and hunting grounds (*hupa*) consist of a larger society (or head-village, called *hosa* too) uniting several peripheral small societies (or branch-villages). As the *hosa* took shape, terms of existence improved, and the population grew, clansmen migrated to other places due to insufficient arable land. New gatherings then emerged and continued to associate with the *hosas*. Eventually all lands of gatherings and *hosas* were incorporated into a clan system. Cou regards the larger society (*hosa*) as a centre while small societies (*lenohiu*) as its branches, constituting a grading and centripetal settlement structure (M.-H. Wang, 1990). Ethnic territories and the hunting grounds are a political and economical unit. Before the Japanese colonial period (1985), there were four such units: Dabang, Tefuye, Lufutu and Imuts. Presently, only Dabang and Tefuye *hosas* are still in existence (see Figure 4-1). A *Kuba*, the men's meeting place, is only built in a large society (head-village). It is a special symbol of Cou political territory. The smaller societies (branch-villages) do not have a *kuba*. When

¹ No native informant sets forth this scheme systematically, and even when the researcher (i.e., Mabuchi, T.) has grasped the general feature of the grading system and begun to discuss it with them, there are few informants, except in some tribes of small size, who can enumerate exactly all unilateral groups of the tribe to which they belong. The reason is simply that members of these groups are not localized, but are scattered widely throughout the tribal area (Mabuchi, 1951)

rituals are to be carried out, members of the small societies (*lenohiu*) are required to go to the *hosas* to participate. As a result, the Cou still preserve the ritual integrity of the tribe: the tribe as a whole forms a ritual group (Mabuchi, 1951). *Peongsi* (the clan's leader or 'the head') is a symbol of the whole political unit. Thus, the social structure of Alishan Cou consists of several branches surrounding a main core, reflecting the Cou's basic values of core and origin (Figure 4-1).

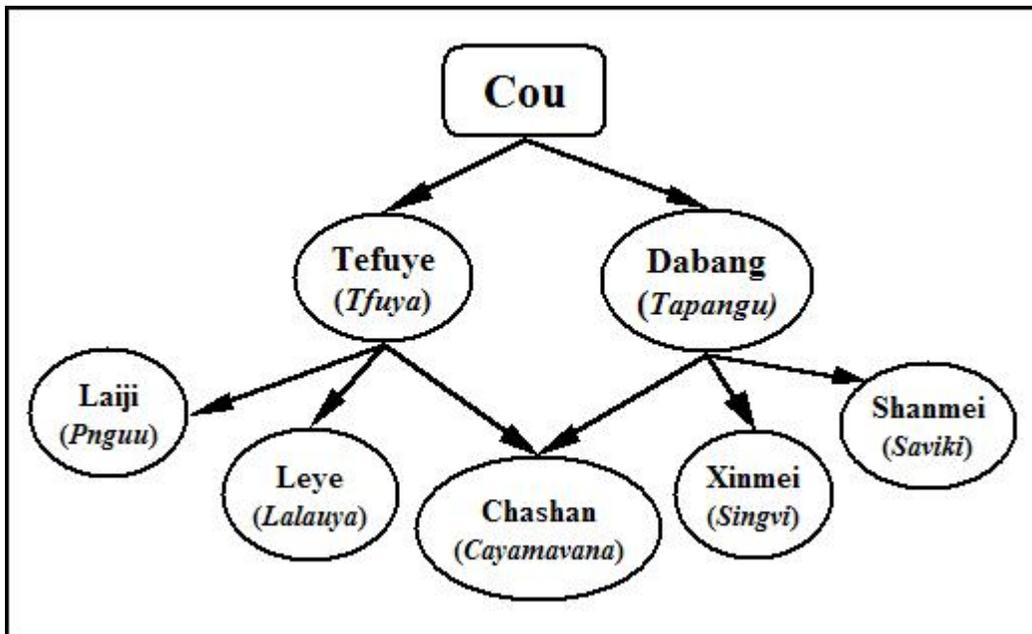


Figure 4-1: Simplified Version of Cou Traditional Social System

Note. Italics in brackets refer to Cou traditional place names. For consistency, the present names of administrative areas (in bold) are used through out this document. From National Taiwan Normal University (2005 p.2)

This structure is supported by traditional slash and burn farming, hunting and fishing. Heads of sub-clans living in *hosas* have great economic and ritual power. Based on the principle of respecting authority, game and land gained in war has often accumulated in the

families of *peongsi* (tribal chiefs) and *eojomu* (commander of the war and head hunting²) (S.-S. Wang, 1999).

4.2.2 Social Life

Farming is women's work. The staple foods are crops, such as millet and sweet potato. Meat and fish are subsidiary. Male Cou traditionally have had engaged in hunting and fishing. The tribe and the clans own land communally (M.-H. Wang, 1990; S.-S. Wang, 1999). The actual right of land-ownership is often executed by the sub-clan “union of households”, which is also a river-owning unit: every river is portioned out for fishing among such units in the village. A sub-clan is the basic social and economic unit. Individuals only have use rights (M.-H. Wang, 2000). In addition to production for oneself and sharing, reciprocal exchange and barter are crucial to the obtaining of daily necessities. To address peak labour demands in cultivation and harvest, a labour-exchange group consisting of several sub-clan groups engages in mutual assistance. Through this system, tribal and clan leaders are supported economically and their leadership is stabilized (S.-S. Wang, 1999). Wealth and power have been created and their accumulation have maintained the operation of the Cou social system through the sub-clan organization's production and production relationships, including traditional slash and burn agriculture, fishing and hunting, and presently cultivation of paddy fields and cash crops. (S.-S. Wang, 1999).

Starting in 1946, the traditional system of tribal chief and elders was replaced by the current administrative system (Wang *et al.*, 2001). Nonetheless, families with a high traditional political position can still execute influence in the modern society. For example, members of the families of the tribal chief and commander tend to be civil servants, doctors and teachers. Families and individuals with higher social status have more opportunity to obtain economic benefits and may gradually become entrepreneurs (M.-H. Wang, 1990).

² The highland tribes were renowned for their skills in headhunting, which was a symbol of bravery and valor. Almost every tribe except Yami practiced headhunting. Often the heads were invited to join the tribe as members to watch over the tribe and keep them safe. The inhabitants of Taiwan accepted the rules of headhunting as a calculated risk of tribal life. The heads were boiled and left to dry, often hanging from trees or head shelves. A party returning with a head was cause of celebration and rejoicing as it would bring good luck. Han settlers were often the victims of headhunting raids as they were considered by the aborigines to be liars and enemies. A headhunting raid would often strike in the field or by catching a house on fire and decapitating the inhabitants as they fled the house. It was also customary to raise the victim's children as full members of the tribe. The last groups to practice headhunting were the Paiwan, Bunun, and Atayal groups. Japanese rule ended the practice by 1930, but some elder Taiwanese can recall the practice (Wikipedia, 2006)

4.2.3 Location and Scope

The current administrative area of Alishan Cou consists of seven villages in Alishan Township in Jiayi County including Dabang/Tefuye³, Leye, Laiji, Lijia, Shanmei, Xinmei, and Chashan (Figure 4-2 and 4-3). Each village is of a different size (Table 4-1) and the total area is 63.8 sq. km (6379.8 hectares), accounting for 14.91% of the total area of the township. In addition to the seven mountainous Cou villages, five Han villages are also located in the township. Most of the township area is state forest land and county-own land. The area of the whole township is 427.85 sq. km, which accounts for 22% of the whole county area. As Table 4-1 demonstrates, the majority of the Cou aboriginal reserved land is forest land and less than one fifth of the region is suitable for farming (M.-W. Wang, 1990).

³ Dabang and Tefuye are two *hosa(s)* – a community with a place for assemblies used for carrying out tribal rituals. The Nationalist Government combined Tefuye and Dabang into Dabang Village on its arrival (Bureau of Cultural Park, 1998; Government of Jiayi County, 2006).



Figure 4-2: Map of Taiwan

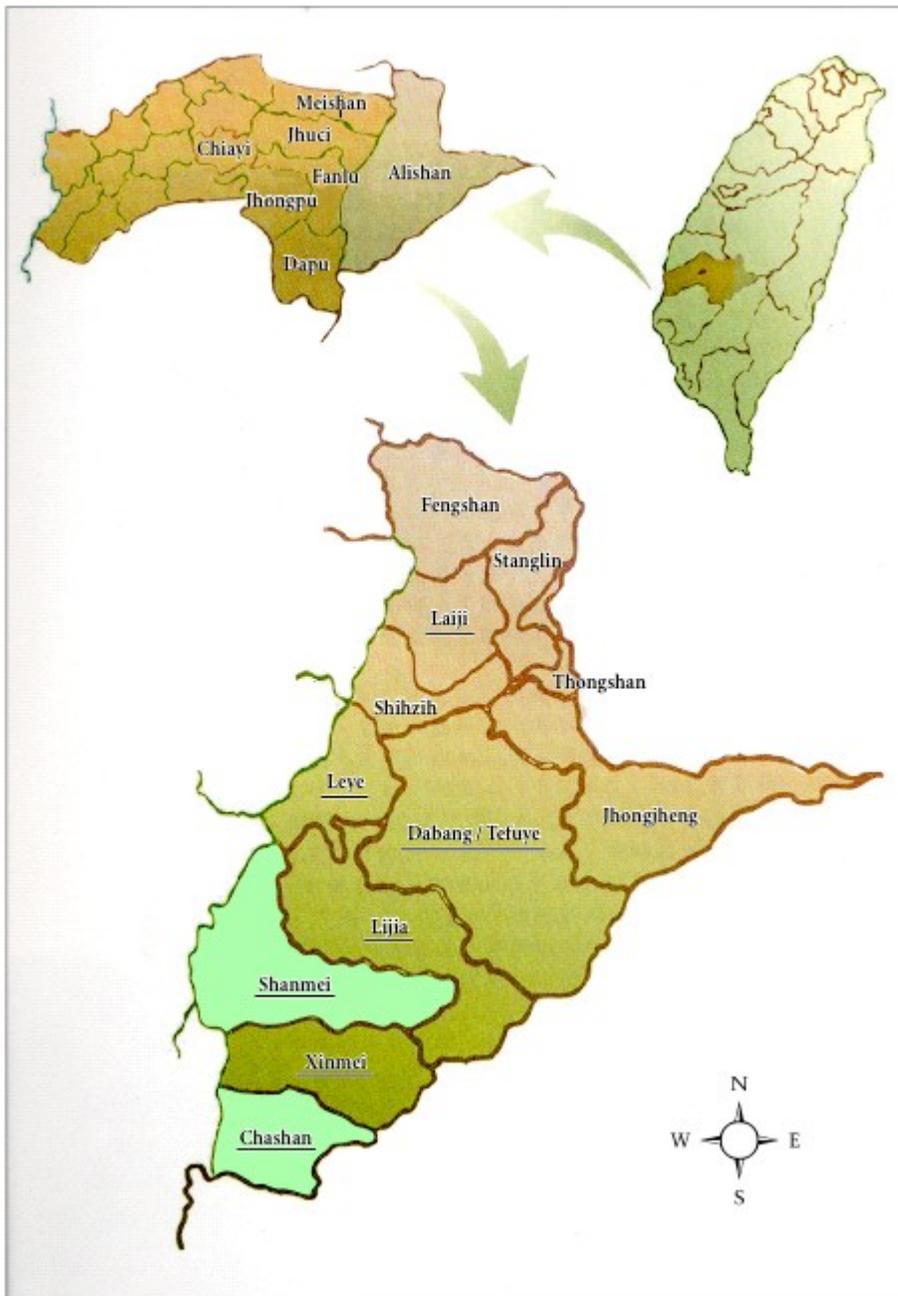


Figure 4-3: Map of Alishan Township, Alishan Cou Distribution and Shanmei and Chashan Villages

Note. Locations with underline are Cou villages. From Shang-Hua Engineering Consultants Co. (2003, December)

Table 4-1: Alishan Cou Aboriginal Reserved Land Divided According to Administrative Areas and Land Attributes

	Farmland (ha)	Pasture (ha)	Forest land (ha)	Others (ha)	Total (ha)
Dabang	259.44	59.13	611.07	63.10	992.73
Tefuye	164.25	5.72	508.49	83.38	761.84
Leye	212.57	0.13	645.81	6.06	864.57
Laiji	93.45	6.53	338.39	4.54	442.91
Lijia	104.78	14.72	711.19	6.68	837.36
Shanmei	78.36 (14.17%)	-----	462.56(83.64%)	12.12 (2.19%)	553.03 (100%)
Xinmei	139.83	0.63	597.26	3.57	741.30
Chashan	132.09(14.20%)	-----	796.30 (85.60%)	1.84 (0.20%)	930.23 (100%)
Total (ha)	1210.37	89.01	4877.55	202.93	6379.86
%	18.97	1.4	76.45	3.18	100

From M.-H. Wang, 1990 p.30

4.2.4 Climate

The township has a mountain climate. The terrain rises from 255 to 3950 meters, with great differences in elevation. The Tropic of Cancer crosses the central part of the township, thus the climate is tropical and subtropical. The temperature and rainfall of each village are different, reflecting height and aspect, and these specific circumstances influence each villages' agriculture development. For example, in recent years, Dabang (950m) and Leye (1180m) cultivated high mountain tea, summer vegetables, flowers and jelly figs, reflecting their high altitudes and relatively low temperatures. In contrast, Xinmei (560m) and Chashan (430m) cultivated giant bamboos in higher temperatures at lower altitudes (M.-H. Wang, 1990).

The rainfall of each village is above 3000 millimeters but it is seasonally concentrated. Rainfall is concentrated in summer from May to September. April to May is “plum rains”⁴ season. Rain from June to September comes from convectional thunderstorms, typhoons and topographical influences. Because the rain is concentrated in heavy downpours, surface runoff creates serious erosion and river flows increase suddenly and violently. The rushing water destroys dykes and field, makes roads and bridges collapse, and cuts off settlement and

⁴ The season of the plum rains or intermittent drizzle, is a special meteorological phenomenon of the middle and lowland areas of the Yangtze River. The term is also used in Taiwan. The climate during this season is characterized by continuous rain and hot temperatures. The ancient Chinese timed the arrival of the season by the growth of the plum. Usually the rainy season begins in early summer when the plums are ripe, and lasts about three weeks. There is an old saying about the rainy season: “When the rain falls on the ripe plums, there follows 40 rainy days” (Hu, 2001)

agricultural areas. Strong winds often break trees and may even destroy houses. On the other hand, drought in winter makes irrigation water scarce and the paddy fields lie fallow. If the drought is prolonged to March and April, drinking water sources dry up and production of makino bamboo is greatly reduced (M.-H. Wang, 1990).

4.2.5 Social and Economic Context

Before the Japanese colonial period, traditional Cou society was self-sustaining supported by shifting cultivation, fishing, hunting and gathering. Hunting was originally the main economic activity, while shifting cultivation was added later. The Shanmei area was the main area of cultivated land and a secondary hunting territory (M.-H. Wang, 1990). The social and economic attributes of the Cou tribe changed significantly during the Japanese colonial period (1895-1945). The Japanese government first introduced the formation and cultivation of irrigated rice fields, the planting of farm and forestry crops (e.g. camellia, giant bamboo, fir), the establishment of exchange offices to collect local specialties, such as jelly figs and rattan, the development of a money economy and trade. The money economy did not immediately replace the Cou barter system but the new production techniques and crop types modified Cou land utilization. Accordingly, the Cou lifestyle gradually moved away from a traditional lifestyle based on subsistence through shifting cultivation towards a market economy (M.-H. Wang, 1990).

Starting in 1945, the Nationalist Chinese government's policies were to "make the mountain like the plains" (*shandi pindihua*) and to "make the mountain modernized" (*shandi shianndayhua*); private land ownership, sedentary farming and forestry were introduced. The policies also introduced trade and "civilization". As a result, the Cou's need for money increased, causing them to shift gradually from a subsistence to a market economy (C.-R. Li, 2000; M.-H. Wang, 1990). In addition, the government's policies on the lands reserved for indigenous peoples, as it claimed, legally incorporated the majority of Cou land and compressed the space available for Cou traditional economic activities. Cou hunting territory and agricultural land became state-own land and the Cou lost their rights of use, management and access to resources (M.-H. Wang, 1990). In addition, many laws related to environmental protection were formulated, one after another, which made the status of the land reserved for indigenous peoples overlap a variety of protected areas. Land utilization by indigenous

peoples, such as for housing, agriculture and other forms of production, were and are restricted by a variety of laws (The Chinese Institute of Land Economics, 1999). Moreover, afforestation and sedentary agriculture have been promoted by the government and, as a result, hunting and fishing have lost their economic significance and have gradually become recreational activities (M.-H. Wang, 1990). After 1953, Cou land utilization was changed to irrigated rice fields and cash crops, such as makino bamboo, giant bamboo, betel, rattan, jelly figs and fir (M.-H. Wang, 1990; S.-S. Wang, 1990). Traditional crops, such as millet, corn, yam, and upland rice were and are also planted. However, since slash and burn agriculture has been greatly restricted, these traditional crops have become crops that were planted in fixed plots on mountain aboriginal reserved land. After 1960, income from makino (*Phyllostachys makinoi*) and giant (*Dendrocalamus latiflorus Munro*) bamboo shoots became a major part of Cou economic life. Makino bamboo shoots are harvested in April and May, while giant bamboo shoots are harvested from June to September. The money earned can cover daily necessities, educational expenses and building fees, and provide a surplus for saving (M.-H. Wang, 2001).

After 1950, the government promoted afforestation of fir in Alishan. During this time, the Cou planted fir on original slash and burn land on large scale because the price of the fir was high. Nonetheless, since it takes at least 15 to 20 years for the trees to grow, the Cou faced the situation where the land could not be used for other purposes and weeding had to continue in the fir forests. During this period of time, except for income from casual labour, there were few other income sources (M.-W. Wang, 2001).

In the late 1960s, the harvesting of mountain products greatly improved the Cou economy and some paddy fields began to lie fallow. The main reason for this was that paddy rice is labour intensive but it was not a cash crop at that time. Income earned from mountain products could be used to purchase grain at a relatively low price. Another reason was that roads were progressively improved in every village. Truck transportation began, facilitating the inflow of grain and this further reduced the desirability of paddy. Transportation enhancement expanded Cou mobility and facilitated the development of commercial land uses, namely market-oriented production (M.-W. Wang, 2001).

Road improvements also facilitated increased communication with the outside world. The road from Shanmei to Sanmin Township, Kaohsiung County was broadened in 1980.

Alishan Highway was broadened and opened to vehicular traffic in October 1982. The road from Shanmei to Dapu Township, Jiayi County was broadened in 1990 (C.-R. Li, 2000; Cheng, 1995). Transportation improvements increased the mobility of people, goods, and information. Greater transportation convenience has changed the marginalized location of Alishan Township and has facilitated commercial agricultural production and marketing (Cheng, 1995).

Between the 1950s and 1960s, villages with convenient transportation and more rapid economic development, such as Leye and Shanmei, were eager to obtain funds. Many villagers rented their land with bamboos and firs to Han people to manage. The rental period was usually 15 to 20 years. The money was used to meet urgent needs, such as educational expenses, buying farming tools, and paying debts. The debts generally came from previous arrears with the contractors and stores (middlemen) in the village. The prices of mountain products were controlled by the middlemen who resided in each Cou village. They formed a chain with stores in Jiayi City. They made profits by purchasing mountain products, such as auricularia, mushrooms, bamboo shoots and firs from Cou at low prices and selling the products at higher prices in the city. Cou people often borrowed money from these middlemen to meet urgent needs, using the following harvest to pay the debt. Because middlemen often offered lower purchasing prices and the interest was very high, the amount of the harvest could not meet the previous debt and many Cou had to relinquish their land to the middlemen (M.-W. Wang, 2001).

In 1983, a cooperative farm was established by the Alishan Cou in Leye, a location with convenient transportation. The purpose of the farm was to have the Cou lead in the production and marketing of agricultural and forest products, thereby reducing the exploitation of middlemen who buy low and sell high. In the first two years, the majority of bamboo shoots in Dabang, Lijia, Leye, Shanmei, Xinmei, and Chashan were collected by the farm at fixed prices, resulting in more local benefits than before. Unfortunately, in the third year, the middlemen collaborated and provided slightly higher prices for agricultural products to attract a few opportunistic members who did not fully understand the fixed price system of the farm. This undermined the confidence of the farm team in their ability to continue the cooperation. Residents began to sell their agricultural products to the middlemen again. The farm did not receive bamboo shoots and, at this time, the middlemen decreased their prices to

the original level, reinstating the original situation which the middlemen controlled (informal conversation, 2004; M.-H. Wang, 2001).

Starting in 1987, responding to the Japanese market demand, the plantation of mountain wasabi was introduced to the high altitude mountain area (S.-S. Wang, 1990). Cou of the villagers in the north, Dabang, Leye, Laiji, and Lijia, cultivated the plant in the forestland near Alishan National Forest Area. Starting in 1990, villagers of southern villages, Shanmei, Xinmei, and Chashan also engaged in the activities. It soon reached a peak; the large quantity of wasabi produced and the manipulation of middlemen caused prices to drop (M.-H. Wang, 2001). More recently, tea plantations developed by Han people have gradually encroached onto the Alishan Cou aboriginal reserved land (S.-S. Wang, 1990). In the 1980s, Leye was the main tea plantation area. Tea plantations had increased in Shanmei, Dabang, Lijia, and Laiji year by year and tea became the cash crop with highest market price. Along the Alishan Highway, most forests had been cut down and replaced by tea plantations. This damaged the environment and landscape severely and sparked widespread concern, aimed at residents of Alishan who are accused to use the previously forested land excessively for tea and wasabi plantations. As a result, the government has obliged the Forestry Bureau to crack down on excessive land use change, delimiting the range of wasabi plantations, and completely rooting out wasabi in forestland in the late 1990s. Many villagers' livelihoods, therefore, were affected (M.-H. Wang, 2001).

Before the 1990s, in addition to tea and wasabi, traditional crops, such as giant bamboo shoots, still had economic significance. Because the introduction of tea resulted in higher wages in tea production, wages of other casual labour increased. Comparatively, the harvest of bamboo shoots with lower market prices and high labour demand is less attractive to Cou villagers. The industry has gradually declined (M.-H. Wang, 2001).

4.3 Tourism Development in the Alishan Area

The Taiwanese government now emphasizes its National Tourism Policy. The “Doubling Tourist Arrivals Plan” (DTAP) is one of the key individual plans of the “Challenge 2008 National Development Plan” for the Executive Yuan. In order to achieve the goal of DTAP, a 2004 Visit Taiwan Year Working Plan was formed, which consists of the following five-point work plan: Domestic Travel Promotion, Festivals and Competitions, Tour Product

Development, International Promotion and Advertising, and Travel Information Network (Tourism Bureau, 2005).

Alishan is a renowned international tourist scenic spot. Since the Japanese Occupation Era, Alishan's sunrises, mountain landscapes, clouds and the wood railway have been famous overseas. Alishan's 'cloud sea' is one of the Taiwan's Eight Views, the most famous spots in Taiwan. According to the Tourism New Strategy of Taiwan in the 21st Century, the Ministry of Transportation and Communications (MTC) sees promotion of the ecological and locals environments for tourism as their main strategy. The Team of Tourism Development of The Executive Yuan is pushing this theme. It asked the government of Jiayi County and the Tourism Bureau to manage an investigation of the scenic spots in the Alishan area and to plan a range of management strategies. After the evaluation, the MTC announced a number of initiatives. The Alishan National Scenic Area Administration was established on July 23rd, 2001 and started to promote a series of tourism development plans (Alishan National Scenic Area Administration, 2005). The plans include 1) revamping the Alishan tour route, which runs from Jiayi along the Alishan Highway and the Alishan Mountain Railway via Alishan to Yushan National Park; 2) road landscape improvement; 3) urban and rural streetscape improvement in both Han and Cou areas; 4) a plan for improving the surroundings and quality of accommodation facilities in Alishan; and 5) promoting major festivals such as a railway culture season, cherry blossom season (March-April), Cou tribe cultural ceremonies, etc.

Since the establishment of the Scenic Area Administration, traditional Cou rituals have been promoted and advertised to tourists, such as *Mayasvi* (triumph/war ritual), *Miyapo* (seeding ritual), and *Homeyaya* (millet harvest ritual) in Dabang and Tefuye⁵. Festivals that are related to Cou clan culture and local features have also been subsidized or expanded one after another, such as the Fona (vitality bean) Festival (Cou group wedding ceremony), the Gu fish festival in Shanmei, and the Pavilion festival in Chashan (Table 4-2). Moreover, tourism promotion activities are held throughout the year by local government organizations. For example, an Alishan Cou aboriginal cuisine competition is held to promote local agricultural products. Subsidies from both central and local governments are distributed to both individuals who participated in the activities and the Cou tribal villages that hold the events.

⁵ Dabang and Tefuye both possess a traditional "kuba" (men's meeting hall). This is a hut-like structure built from wood and straw where the men of the tribe gather to make important decisions to pass on tribal traditions and legends to the youth.

For example, Alishan National Scenic Area Administration has paid local Cou to perform in the Fona Festival. Small-scale construction projects, such as trails, pavilions and observation platforms, have been built by the local Cou males. Local Cou make income through these occasional job opportunities. The events and activities have increased the chances for local Cou to be directly or indirectly involved in tourism-related activities.

Table 4-2: The Schedule of Cou Traditional Rituals and Contemporary Festivals

Date	Ritual/Festival	Location	Note
1 st January	<i>Miyapo</i> (seeding ceremony)	Dabang/Tefuye	Traditional Cou ritual
15 th February	<i>Mayasvi</i> (triumph ceremony)	Dabang/Tefuye	Traditional Cou ritual
July/August	<i>Homeyaya</i> (millet harvest ceremony)	Dabang/Tefuye	Traditional Cou ritual
Mid-November	<i>Fona</i> (vitality bean) Festival (Cou grouped wedding ceremony)	Dabang/Tefuye	Contemporary festival
November	Gu Fish Festival	Shanmei	Contemporary festival
November	Pavilion Cultural Festival	Chashan	Contemporary festival

4.4 Summary

The policies of two colonial regimes have greatly influenced Cou land use, culture and economy. They have resulted in modification of Tsou livelihoods. In addition to external factors (i.e., policy, history, macro-economic conditions, climate, demography, and social differentiation) as indicated in the framework, traditional Cou social structure, its supporting political values, and its operational characteristics continue to influence Cou people. The above overview provides a context from the past to the present, identifying different livelihood pathways over different time-scales that preceded tourism.

CHAPTER 5

LIVELIHOOD STRATEGIES AND CHANGES BEFORE AND AFTER TOURISM DEVELOPMENT IN SHANMEI VILLAGE

5.1 Introduction

Shanmei serves as the first case study, exploring the evolution of livelihood strategies and reflecting the adaptation of Cou society to internal and external pressures as well as their future aspirations and goals. The information is also useful in identifying factors affecting the introduction of tourism. This chapter examines the changes in livelihoods before and since tourism initiatives, examining how residents perceive the consequences of tourism. Using the sustainable rural livelihood framework to guide the analysis, the chapter starts with an overview of Shanmei, including its geographical and human environment. This provides a context for an understanding of local livelihood pursuits. A detailed description of the development process of Danayigu River tourism and related organizations and institutions for its management is provided. The data illustrates the multiple purposes of tourism development and the components that are essential to make the initiative succeed. An overview of current livelihoods demonstrates how and in what forms tourism has been incorporated into local livelihood strategies. Further analysis of the benefits and costs of conservancy formation and tourism enterprises reveals how different assets are being accumulated and depleted and what new resources are being created.

5.2 Geographical Environment

Shanmei is located in the mountain valley of the middle reaches of the Tzengwen River. The annual average temperature is 20.4°C, with the highest in monthly mean in July (25.8°C) and the lowest in January (13.5°C). The annual rainfall is 3,100 mm. The rainy season is from May to August while the dry season is from November to February (M.-H. Wang, 1990). The altitude of Shanmei's land reserved for indigenous people is from 370 to 1,190 meters. The total area of aboriginal reserved land is 588.8 hectares including 228.3 ha. of farmland (38.7%) and 354.8 ha. of forest land (60.3%) (Tang, 2002). Nowadays, native plant groups can only be seen above an altitude of 1,000 meters. Lower areas have been opened up and planted with fir, makino bamboo, giant bamboo, tea, betel and other field crops.

The altitude and weather have a major influence on crops grown. The cultivated areas of Shanmei are located at a relatively low altitude. The temperature has increased in the past 40 years and insects have also increased. Both factors have reduced crop options (Interviewee SC001, 2004). Crops produced in Shanmei overlap greatly with those produced in large quantities in the lowland. As a result, the agricultural products of Shanmei are in a weak competitive position (Interviewee SC001, 2004).

5.3 Human Environment

5.3.1 Overview of Shanmei

Shanmei is located in the southwest foothills of Alishan County, 48 kilometres from Jiayi City. The village consists of seven neighbourhood units and one ecological park (Figure 5-1). It takes a half hour to drive from neighbourhood unit one to seven. Shanmei has 189 households and the population is 668 (Table 5-1). Almost all (99%) of the population is Cou (personal survey 2005; Chiou, 2003).

The structure of the local government in the village is typical for Taiwan as a whole, which is the village office, under the jurisdiction of Alishan Township Administration Office. The village head is elected by village members. The business of the office includes declaration of government decrees, processing applications related to identification, social welfare, and subsidies and loans. Shanmei Community Development Association (please refer to Appendix C for detailed information) was established in 1993 and is responsible for all village decisions, preparing village level development plans, and their implementation. It is overseen by the village office. Its organization structure and pattern of decision making are discussed below.

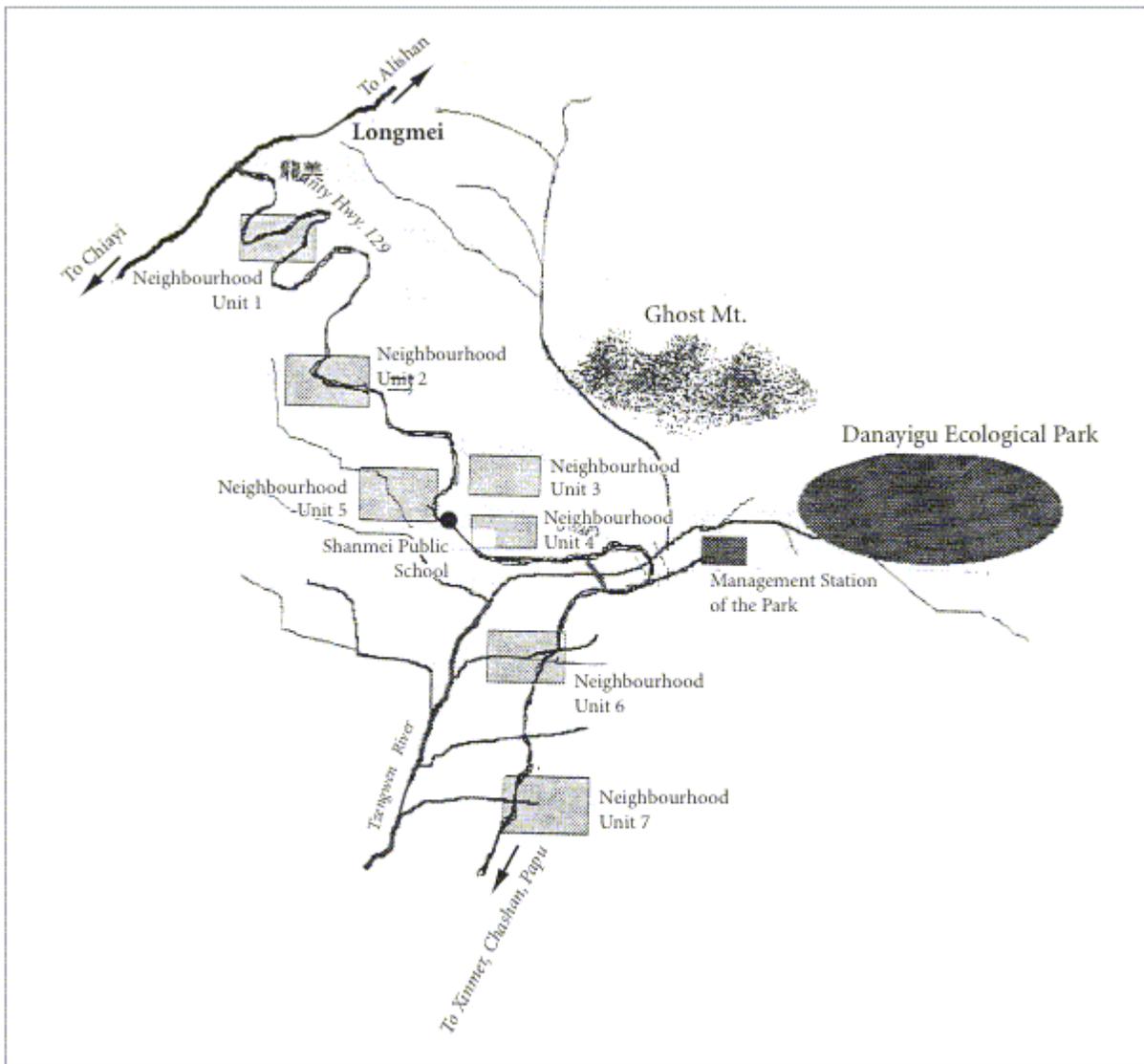


Figure 5-1: Map of Shanmei and the Locations of the Danayigu Ecological Park and Seven Neighbourhoods

From H.-C. Tang, (2002).

Table 5-1: Socio-demographic Characteristics of Shanmei Residents

<u>Sex</u>	<u>n</u>	<u>%</u>		<u>Education level</u>	<u>n</u>	<u>%</u>
Male	347	51.9		Primary school & under	240	35.9
Female ^b	321	48.1		Junior high school	82	12.3
<u>Age</u>				Senior & vocational school	143	21.4
Under 18	148	22.2		College and university	58	8.7
18-24	72	10.8		Graduate school	2	0.3
25-34	154	23.1		Unknown ^c	143	21.4
35-44	121	18.1				
45-54	89	13.3				
Over 55	79	11.8				
Unknown	5	0.7				
Total	668 ^a	100.0		Total	668	100.0

Note. ^a The number includes some villagers whose household registrations are not in Shanmei to obtain the numbers of people who migrated out of the village for study and work. ^b Females who are married with household registration out of Shanmei are excluded. ^c The first reference only includes members of Shanmei Community Development Association (N=409) who had reached the age of 16 and with a household registration in Shanmei. The second reference does not have the information on education levels. From: “The Handbook of the Sixth Annual (I) General Assembly of Shanmei Community Development Association of Alishan Township in Jiayi County : The Minutes of the Meeting” by Shanmei Community Development Association (2005a); “Basic survey of socio-demographic characteristics of Shanmei residents” by Cou Culture and Arts Foundation (2005, May).

5.3.2 Initial Settlement of the Village

The Cou name for Shanmei is Saviki. Legend has it that about three hundred years ago, Saviki was a *hosa*¹ with a complete political structure. About two hundred years ago, repeated battles and plague caused massive deaths. The rest of the population gave up the *hosa* and fled to places such as today’s Xinmei and Chashan, and the *hosa* was therefore extinguished. The ancestors of the majority of the current Shanmei residents came from other Cou villages in Alishan Township, such as Dabang, Tefuye and Lijia, in the past two hundred years (J.-S. Gau, 1999). As a result, under the Cou settlement hierarchy, the current Shanmei village is only considered to be a *linohiu*¹ (D.-S. Gau, 2004). Even though a *linohiu* (Shanmei) does not have a *kuba*, its social system is similar to that of the *hosa* with a complete clan organization, a hunting system, tribal ethics, and traditional habits and customs (S.-S. Wang,

¹ The *hosa* – A community with a place for assemblies used for carrying out tribal rituals. Presently, only Dabang and Tefuye *hosas* are still in existence. The large communities have power over several smaller satellite communities (*lenohiu*). When rituals are to be carried out, members of the smaller communities (*lenohiu*) are required to go to the *hosa* to participate (Bureau of Cultural Park, 1998).

1990). The traditional relationships between families are still important sources of community strength.

5.3.3 Contemporary Social and Biophysical Environment

Village infrastructure includes a village administrative office, a community development association office, one police station, one clinic, three churches (Catholic, Presbyterian and True Jesus), one elementary school with a nursery and a recreation centre. The churches are other important community organizations which have contributed to the construction of new social relations². The Presbyterian Church was established in 1953, followed by the Catholic and True Jesus Churches. The Catholic Church is devoted to the realization of local culture and indirectly encourages revitalization of traditional rituals (S.-S. Wang, 2003). The Catholic Church has more followers (about 105 people have received baptism) than the other two. No clergy is stationed in the the village and the level of the church's involvement in community affairs is low. At present, approximately 10 people go to the church on Sundays. The organization of the Presbyterian Church is comparatively de-centralized. There are about 48 people who have been baptized. Approximately 30 people go to the church on Sundays. Because the church has local clergy and has participated in local affairs for a long time, Presbyterianism has had a large influence on the course of Shanmei's development. The True Jesus Church is relatively de-centralized in organization, but mostly missionaries are assigned to local branches from the main office. The number of followers is about 29 (Liang & Chang, 2005).

A well-paved local road, Route 129, provides access to Jiayi City and connects with Xinmei and Chashan which are nearby Cou villages. Public transportation is not available. Several national welfare programs for aboriginal people exist (Table 5-2) and, in addition to the national welfare program, Jiayi County and Alishan Township also provide several welfare programs to aboriginal households with single parents and low incomes.

² The religious practices of Cou peoples centre on their animist beliefs, in which spirits are seen to exist in many forms. These include deities in the natural environment, spirits of dead people, living creatures, and ghosts. These spirits may be benevolent or malevolent, and so can influence an individual's or community's fortunes. It is necessary, therefore, to discern the spirits' will before undertaking important tasks, or in order to find causes of illnesses, disasters, or social problems (Government Information Office, Taiwan, 2005). Presbyterianism was first introduced to Cou villages in 1946. Because its one-god belief was in conflict with Cou traditional belief, the ritual *Mayasvi* (triumph/war ritual) in Tefuye was cut off for several years. The ritual has resumed now (S.-S. Wang, 2003).

Table 5-2: Subsidy Program of Council of Indigenous Peoples to Different Age Groups of Aboriginal People

Age	Amount of subsidy/term/person	Note
3-6 (pre-school)	NT\$6,000 (CAD\$240)	Granted
6-15 (public to middle school)	NT\$2,500 (CAD\$100)	Granted
15-18 (high school)	NT\$4,800 (CAD\$192)	Granted
Over 18 (college)	NT\$20,000 (CAD\$800)	Limited number
Over 18 (college) – low income family	NT\$15,000 (CAD\$600)	Granted to all applicants
Scholarships and bursary	NT\$25,000 (CAD\$1000)	¼ of the aboriginal students can be subsidized
Over 55	NT\$3,000 (CAD\$120)	Granted
Over 70	NT\$4,000 (CAD\$160)	Issue to low income family

From Jan & Yang, (2002); interviews (2004; 2005)

A savings cooperation society helps villagers to form saving habits and teaches them about investment, insurance, and money management. It also provides small-scale loan programs for villagers needing financial support to deal with a sickness or death in the family or to start a new business. Its stipulations are not as strict as banks and the easier loan availability could reduce some capital constraints and encourage villagers to assume more risk (from economic misfortunes). Groups of women usually organize saving groups in the community, so that the cash earned from casual labour can be saved to meet various future needs rather than being used up right away.

A light truck carrying meats, vegetables and fruits from Jiayi appears in Shanmei at dawn every day. Younger females under age 40 greatly rely on the supplies from the truck to prepare three meals each day for their families. The truck also takes orders for certain ingredients not produced in Shanmei from villagers who run food stalls and eateries.

5.4 Contemporary Livelihood Pathways

Up to the 1960s, Shanmei residents still could meet their physical needs by cultivating a variety of crops and raising mountain pigs and chicken on a small scale and by collecting natural resources, such as honey, medicinal plants and rattan. Barter and reciprocal exchange with neighbours was an alternative means of acquiring needed goods. However, the exchange was not always as explicit as trading “a bag of broad beans for a bag of peanuts” (Interviews, 2004). Often goods were “given” as part of a network of reciprocal obligations in which those

with a current surplus shared with those in need, in recognition that the obligation would work the other way around at other times.

External Influences

Primary activities dominated the economy of Shanmei before 1980 with fir and bamboo as the most important cash crops. Local specialities, such as edible fungus, jelly figs and rattan were also collected for sale. The altitude of Shanmei village is relatively low and is suitable for the growth of bamboos (Interviewee SC001, 2004). Different varieties of bamboo, such as makino bamboo and giant bamboo, can be collected all year around (Cheng, 1999). However, after the Republic of China (Taiwan) and Japan broke diplomatic relations in 1972, the bamboo shoots produced in Taiwan were no longer the main source of supply for the Japanese market. The prices of the products decreased because of competition with those from mainland China and other East Asian countries with cheaper labour. Only the bamboos along the roads are now collected, otherwise the benefits do not exceed the cost of labour (Interviewees SB001, SC001 and SA009, 2004).

Internal Influences

In an attempt to maintain the benefits derived from bamboo shoot products, bamboo shoot collection centres were once established in each neighbourhood unit of Shanmei to transport bamboo shoots collectively to the market in the city. Later, the centres were converted to processing factories with the intention to create added value to the bamboo shoots, thereby reducing the limitations of market trading times and prices (M.-H. Wang, 2001). Nonetheless, the lack of funds, skilled management and administration personnel made running the processing factories difficult. Also, the government has not had a long-term program to guide mountain agricultural development. As a result, the facilities have been left unused (SB001, Interview, 2004).

During the 1980s, oiltea camellia trees were extensively planted and later were cut because market prices were no longer lucrative. Later, the Council of Agriculture promoted planting fir and Taiwan acacia for the conservation of water and hillside soils. Planting trees could not support a whole family, because it takes at least 15 to 20 years for the trees to grow. Means of sustenance were required in the interim (Tang, 2002). Thus, the fir and Taiwanese acacia were felled for sale in recent years and re-afforestation did not occur.

In the 1990s, the economy in Taiwan was booming and people had spare time to make tea, drink tea and talk about business. The money spent per group on purchasing tea of supreme quality and drinking it in the stores of the cities could reach several tens of thousands of yuan per day (Can\$: thousands). Therefore, the price of tea was very good and residents in neighbourhood unit one started to cultivate tea seedlings on their land on a large scale. Tea leaves are generally picked three to four times each year. Tea plantation owners in Alishan needed a huge amount of labour to pick tea leaves, carry fertilizers and for weeding (Interviewee SA009, 2004). In order to let women in Shanmei obtain these occasional jobs, a class on picking tea leaves was established in Shanmei and it supplied labourers systematically to tea plantations.

After the 1990s, with overproduction and consequent low market prices, most Shanmei residents gave up planting cash crops, such as tea, ginger, peaches, and custard apples. Agriculture has declined and almost all of the fields in Shanmei now lie fallow (Interviewee SC001, 2004). Many young people do not return to Shanmei after they finish their education in cities. They either get married or look for urban jobs such as labourers or concrete form moulders.

Transportation Improvement

Truck transportation to the village following the completion of the Alishan Highway started in 1976. Agricultural and forest products produced by Shanmei Cou could then be transported directly to Jiayi by truck, rather than being carried for 4 to 5 hours to Chukou to trade with middlemen (M.-H. Wang, 2001). After the Alishan Highway opened to traffic, numerous tea plantations and high mountain vegetable farms opened along the highway and on Danayigu's hilltop, the majority operated by Han people. The land of Shanmei neighbourhood unit one (*cacaya*) that is close to Alishan Highway and adjoins a Han area has been converted to tea and betel farms due to its relatively high altitude. Pesticides used in the tea farms have polluted the soil and have reduced the water quality (Li & Tang, 1999).

Before 1980, there were less than 10 motorcycles in Shanmei. Shanmei Cou began to make the most of their income from seasonal work, such as picking tea leaves and collecting mountain wasabi which was produced at higher altitudes. After 1985, every household had motorcycles and truck transportation was also available (Interviewee SC001, 2004). The

increased transportation convenience changed lifestyles dramatically. As the person who used to be in charge of recreational agriculture in Shanmei indicated (Interviewee SA009, 2004):

In fact, villagers prefer to make money from those seasonal jobs, the kind that what you do for today, you got paid today.

Transportation improvements not only changed Shanmei Cou land utilization and increased employment opportunities, it also brought tourism development opportunities (C.-R. Li, 2000). Facing the decline of agriculture, a new generation of farmers started to think about “how to carry on and to make Shanmei’s tomorrow better?” Village head SB001 proposed a “self-reliance” plan (M.-H. Wang, 2001). He believed that the Cou should find their strength in something that the Han Chinese lacked - namely, the land beneath their feet (Liu, 2002b). The most important concept of the plan was rather than transporting agricultural products to the lowland and being exploited by middlemen, why not let lowlanders come to the mountains to purchase? Hence, thought and action were channelled in this direction (M.-H. Wang, 2001).

In summary, the social and economic vicissitudes of Shanmei began with the introduction of market economy during the Japanese colonial period. More dramatic change came from the Nationalist Chinese government’s policies “make the mountain like the plains” (*shandi pindihua*) and “make the mountain modernized” (*Shandi shiandaihua*). The improvement of transportation and the introduction of a market economy resulted in a shift in Shanmei Cou economic activities from slash and burn agriculture and hunting, to a sedentary agricultural and forest industry, and towards tourism.

5.5 Development Process of Danayigu River Tourism

In the context of declining agricultural and forestry industries and growing interest in encouraging tourism development in the larger society, the abundant landscape resource in Shanmei were considered as a potential major attraction for tourism. Thus, some Shanmei villagers began to propose a series of plans for tourism development. The Shanmei Tourism Research Group was established in 1985, which was comprised of seven neighbourhood unit heads. They proposed that Alishan Township Administration make an overall plan for scenic places in and near Shanmei, such as the great cliff (*yuathoma*), the fairyland waterfall (*suhngu*), swallow gorge (*tobunkoya*), spirit mountain (*vayangasana*), and Danayigu. The administration did not pass the plan, due to the lack of funds, but a few villagers still made

attempts to get the initiative going. The Shanmei Tourism Promotion Committee was established in 1987, which was comprised of the village head, seven neighbourhood unit heads, and a missionary. One member put forward an idea of tourism development by way of restoration of Gu fish in Danayigu River as the major scene and delimitation of the surrounded area as a park (C.-R. Li, 2000; M.-H. Wang, 2001).

5.5.1 History of the Protection of the Danayigu River

There is a long history of the use of the resources in the Danayigu area. Its special attributes are revealed in a variety of forms, from the contents of a Cou legend, aboriginal resources use, exploitation during the Japanese colonial period due to devastating historical events, and recent excessive fish catches by Han people. The following sections will present and examine recent measures used to revive, protect, and use the Danayigu River resources.

Danayigu during the hunting prohibition period

Legend has it that the Danayigu area was originally a sacred place of the Cou people. Why it became a sacred place is recorded in Cou legends (Box 1). Because clansmen believed that there are *hicu*³ in Danayigu, when Shanmei and Lijia villagers passed by there, they would tie up their dogs and secure their guns to prevent disturbing *hicu*. Therefore, it became a traditional natural protected area (narration by J.-S. Gau 1999, cited in M.-H. Wang, 2001).

Thus, before the intervention of the external colonial regimes, the combination of legends and taboos regulated the behaviours of the Cou and had made Danayigu an area in which hunting was prohibited.

³ Those supernatural forces that are invisible but influence life are called *hicu* (ghosts, spirits and gods) by Alishan Cou of the Northern Cou as categorised academically (S.-S. Wang, 1995 p.2).

Box 1: Legend of Danayigu Area

“...Once there was a devil disease (Cou: tma'congo no hicu) [variola] that spread to Cou people. I was told that my grandfather and the Yang family fled to this place and hoped that the patron god of Danayigu would protect them. This place, Danayigu, is a natural ecological protected area that has been passed on from the ancestors: no hunting, no fishing; anyway [you] cannot kill any living things in this place because this is the homeland of the god of the natural environment” (J.-S. Gau, 2004 p.43). There was a large amount of wildlife here, such as goats, boars and sambar deers. They were not afraid of humans and slept on the road. It was said that the patron god created life water (Cou: nsoo¹) for all the animals here. If a large animal dominated a small one, the patron god would show up immediately and become a huge white deer to give the bully animal a lesson (J.-S. Gau, 2004, p.43-44).

It was said that once there was a young man called Tibu who did not listen to an elder. The elder said that if you see a huge white deer in Danayigu, he is the patron god. You must be respectful and must say “Please allow me to pass through your homeland.” Yet Tibu figured that if he shot the huge white deer that everyone revered, he would become mightier than the patron god. He thought that not only would he become the king of Danayigu, but the chief of the Cou would also respect him. One day Tibu went hunting with a group of people. When reaching the homeland of the patron god, he fell behind the group on purpose. When he reached the life water place, he saw that the huge white deer was drinking the water and he drew his bow surreptitiously. When he aimed his arrow at the deer, the antlers of the deer instantly elongated into the sky and shone. Tibu slowly put down his bow and the antlers also quickly went back to their original form. However, the idea of becoming a god had made Tibu lose rationality; he drew the bow again and was about to let the arrow fly. At that moment, the antlers elongated into the sky again. Tibu put down the bow immediately and the antlers once again went back to their original form. The deer shook its head to express that Tibu could not break the rules of Danayigu. Nonetheless, Tibu thought that he was the person who was going to change the rules and he decided, at the third attempt, he would let the arrow fly no matter what happened. On his third draw, the patron god gave him a final chance. The antlers not only elongated into the sky and shone, but also grew holy orchids in blossom. Tibu was already dominated by the devil of power and, no matter how the antlers had changed, he still fully drew the bow and let the arrow fly. When the arrow was about to reach the deer, the deer used its antlers to deflect the arrow and it ended up in Tibu. He regretted his action but he had lost the three precious chances. He leaned against the rock beside the road. The next day the hunting group came back. When the elder saw Tibu, he already knew what had happened. Tibu described the event and died. The elder asked the other young men to bury Tibu and told them that Danayigu is the place where all kinds of animals come to reproduce. It is a shelter for many young and feeble animals, especially those in labour. They would come from other mountain areas, give birth to their babies, wait until their young grow up till they can protect themselves, and then take them back to their original places. Therefore, in order to preserve the sustainable hunting resources for future generations, the patron god of Danayigu set up the rules of natural ecological protection in Danayigu (J.-S. Gau, 2004, p.44-45).

Note. *nsoo* means spring water place where animals gather regularly and drink water. It is different from general spring water (*esbabuka*) and is usually in a remote mountain area. The water is clean and has the flavour that animals like (M.-H. Wang, 2001 p260).

Danayigu during the Japanese occupation

The Cou were originally the landlords of Tainan, Jiayi, and Yulin (i.e., the area of the west coastal plain of Taiwan). Outsiders (mainly ethnic Han) had brought a plague to Taiwan that almost eliminated the Cou race. Therefore, the Cou left the plains and moved to the mountains. Later, immediately before the Japanese government came to Taiwan, the devil disease (Cou: *tma'congno hicu*) [variola] (the variola virus was called the devil that ate people by the Cou) spread to the Cou tribes in the mountains. The Cou population decreased dramatically from several tens of thousands of people to only just over 2000 people. Taiwan Masters (a title for Buddhist/Taoist priests) from overseas were unable to resist the disease and *yoifo* (shamans of the Northern Cou) were also infected by the virus. The events caused the Cou to question their belief in their gods, because they were unable to protect the people (J.-S. Gau and S.-Y. Juang, Interviewee SC001, 2004).

A young man named Moo, who had lost his beloved parents and fiancée, decided to go to the plain to learn new knowledge. He encountered the Japanese soldiers and gradually he learned Japanese. After two months, he was sent to a clinic to study medicine. One day, the head of Japanese Jiayi police station asked Moo when his hometown was going to hold rituals, because he wanted to attend the rituals to set up a contract of cooperation with the Cou. Moo went to his hometown and discussed this with the Cou chief. The chief held a meeting of the elders to discuss whether they should let the Japanese come. Moo explained that the Japanese had given him vaccines for the devil disease which could completely prevent the devil virus. He indicated that he thought that the Japanese were not hostile. The resolution of the meeting of elders was to let the Japanese come (J.-S. Gau, 2004).

When the Japanese came, two chiefs and representatives of each clan (or joint family) attended the negotiation meeting with the Japanese and the initial conclusion was as follows:

1. The Cou would give up the plain (the sovereignty of Jiayi, Tainan, Yulin, and Zhanghua) and let the Japanese manage the area;
2. All medical expenses (including food and lodging) of Cou patients who had infections would be covered by the Japanese government;
3. The Japanese government would be responsible for establishing schools for each Cou tribe and for fostering Cou talents. The expenses of Cou education would be free up to the university level and further research funding would be provided. The outstanding students would be sent to Japanese universities for further advanced studies, or sent to

advanced Western countries. All the expenses of advanced studies including research, transportation, food and accommodation would be covered by the Japanese government. The Cou, hereafter, would be self-governing but they had to change from being hunters to take up agriculture.

4. Reserved land would be delimited: Japanese scholars would be sent to designate reserved land for each tribe, so that the tribes would not encroach upon each other's lands. Han people would not be allowed to trespass on the lands.
5. The Cou were not to sacrifice human heads in worshipping the gods. The Cou hereafter used boars to replace human heads (J.-S. Gau, 2004 p. 29-30).

Later, it was agreed that the Japanese could come to Danayigu to harvest camphor trees.

As SB001 (2004) stated in the class on the Cou's culture and history:

...The only regret was that the protection of Danayigu ecology did not persist. If the god had truly protected this environment, why didn't he protect the people of Shanmei? So they would rather make a contract with Japan, because they brought that medicine to save, save, save lives. This is probably the real reason.

Even though the Cou's slash-and-burn agriculture and "fire hunting" (driving animals with fire) had made the majority of the Shanmei area grassland, there were still forested areas scattered in the river basin, on mountain tops and cliffs. This was especially the case in the Danayigu River basin, which had the largest forested area.

The Japanese government came to Shanmei in 1905 in order to exploit the abundant natural resources, particularly through felling camphorwood and producing camphor (C.-R. Li, 2000). In 1920, the Japanese set up camphor furnaces in Shanmei village (Song-xia-fang-san-lang, 1924). Between 1932 and 1936, the Japanese brought in over 300 Hakka⁴ camphor workers, which at one point was more than the population of Shanmei. They felled trees and obtained camphor oil for five to six years (J.-S. Gau, 2004; Taiwan Government General – Development Bureau, 1938). SB001 (ex-village head) memorized what the elder Wang had told him: "When they were felling thousands of years old camphor trees, since the sound was

⁴ The Hakkas are an ethnic group of "Han" Chinese originally active around the Yellow River area. Most scholars agree that Hakka Chinese migrated from northern China to the south starting from the East Jin dynasty (317-420 AD). The infusion of tribes from the north, flooding, grasshopper plagues, droughts, famines, and wars in the north drove people en masse to the south and they settled in Jiangxi, Fujian, Guangdong, Sichuan and Taiwan. The local people in the south called these northerners "guest families" when they started to settle in the area. The spelling "Hakka" is derived from the pronunciation in Hakka dialect (pronounced as "haagga" in Hakka and "kejia" in Mandarin) and "kejia" literally means "guest families" (Asiawind.com, 2004).

so loud, a number of animals ran away from Danayigu. Those that did not run away were hunted and killed. The loggers not only felled trees and hunted animals, they also went fishing in Danayigu River. Later the Japanese came to our home and asked us to move to Lijia. Meanwhile, they saw and smelled the orchids. Afterwards, they sent 100 workers to pick all these precious orchids and that was how Danayigu natural protected area was eliminated.”

After Japan was defeated and the Japanese left, the elders of Shanmei and Lijia had a meeting. It was said that after the patron god of Danayigu had left, no god had taken care of the area. The homeland of Danayigu was ruined. It was decided to distribute parts of the mountains and the river to each sub-clan or joint family to manage thereafter (J.-S. Gau, 2004, p.47).

The legend of the young man shooting the huge white deer had enabled SB001 to learn precious natural rules: when human beings violate the natural rules, they themselves suffer. This lesson later had an important role in SB001’s implementation of the plan to restore Danayigu. He commented that: “Indigenous people already had the precious knowledge to sustain the ecology; nonetheless, external regimes ignored the natural rules for short-term benefits.... When the Japanese came to Taiwan, the Cou should have had guarded this life-giving river that had sustained an ecologically-based culture, because it is a warehouse of natural ecology. It is more important than *kuba*⁵ (the men’s house). When *kuba* breaks down, it can be re-established; but it is too difficult to restore the destroyed natural ecology by human means. It takes four to five hundred generations of human beings for thousands of one to five thousand years old trees to re-grow.” (J.-S. Gau, 2004 p.47-48).

The division of the Danayigu River into fishing grounds

It was said that Danayigu was an area in which hunting was prohibited. Therefore, before the extensive lumbering of the Japanese, each sub-clan (joint family) of Shanmei Cou only had their share of the fishing grounds within the boundaries of the Tzengwen River, but not on the Danayigu River, which is a tributary of the Tzengwen River. The Cou felt that they were safe and could support themselves until they saw external ethnic groups exploit the natural resources. Then, Cou joint families started to abandon their traditions and taboos. They

⁵ *Kuba* traditionally served as religious, political, and masculinity training centres. Enemy heads and a box of implements for igniting fires are kept there. Wwomen are not allowed in a *kuba* (Vost, 1995).

started to hunt and the elders held meetings to set up approximately a dozen fishing grounds along the Danayigu River and to use the fish resources (C.-R. Li, 2000).

Nevertheless, Cou traditional social values, the subsistence economy, supernatural beliefs, the ways of fishing, and the organization and rules set for fishing regulated the frequency and patterns of fishing activities (C.-R. Li, 2000). A clan was the unit of use of the Danayigu River. In other words, an individual's behaviour in using the river was based on whether the individual was a member of the clan that owned that part of the Danayigu River. Only clan members were allowed to fish in their own fishing grounds. It was said that each clan would put a curse on their fishing ground boundary in order to guard against people entering without authorization. It was also said that if the fishing ground jurisdictions were violated, the culprit would die by the curse. In addition to use by each clan, collective use by the entire tribe also existed. Also of importance was the restriction of fishing during certain periods, sometimes as long as three or five years. After the stocks had been replenished and with the agreement of the entire tribe, fish could then be caught collectively (T.-M. Li & Tang, 1999). Fishing was traditionally undertaken for subsistence but with added meanings for rituals, entertainment and social unity (C.-R. Li, 2000; M.-H. Wang 2001). Most importantly, because the Japanese government had banned the poisoning of fish and because the Cou had a sparse population, the Danayigu River had abundant fish resources (C.-R. Li, 2000)

The Danayigu River under the Nationalists

After the Japanese had been defeated and had withdrawn from Shanmei, fishing with poison happened again. Since, traditionally, the Cou did not eat swamp eels, there were a number of huge swamp eels in the river. The camphor workers, who were about to be withdrawn from the area, fished for the eels with poison. There were so many dead swamp eels that they could not take all of them so they only chopped off and took the eel heads. The rest of swamp eels were collected by the Cou to feed pigs (J.-S. Gau, 1999). This was the first time that Han people had poisoned fish in Danayigu (C.-R. Li, 2000).

In the early years of Nationalist rule, because of the remote location of Shanmei and the measures that were put in place to control the mountain region, the fish resources in the Danayigu River had not yet been severely damaged (C.-R. Li, 2000). The families that owned the fishing grounds still respected the rules. For individual or family use, men usually brought a torch and fished with spears. For an important family event, men would kill fish with

poisonous vines and the amount of poisonous sap that was used was measured precisely so that it would not seep into other fishing grounds. With regard to fishing with poison for the entire village, each clan would coordinate a common time for fishing (C.-R. Li, 2000; M.-H. Wang, 2001). Men mixed the mature fruit of local poisonous plants such as *otofnana*, *otofnana no c'oeha*, or *evi no c'oeha*⁶ to poison fish. Only big fish were picked. The harvest was then distributed to each family member who attended the activity, even to those who did not own fishing grounds (C.-R. Li, 2000). This fishing activity was held only after certain important tribal activities or rituals (about every three to five years) (M.-H. Wang, 2001). The Shanmei Cou indicated that the last time that they had fished collectively by the traditional way of poisoning fish was in December 1979 (Li & Tang, 1999).

After the improvement of road connections, more and more lowlanders came to the Tzengwen River and the Danayigu River, many of whom used electrocution and poison to catch fish. Through observation and imitation, a new generation of Shanmei villagers learned how to electrocute and poison fish themselves. The traditional property rights over the fishing grounds and the traditional rules of fishing survived in name only. The huge consumption of the fish in the Danayigu River resulted in a sharp decline in the stocks (C.-R. Li, 2000; Liu, 2002b).

5.5.2 The Development of Danayigu River Tourism

Background

SB001 is ex-village head. He was once bitten by a hundred-pace viper when he was young and his left leg became disabled. Later he became a pious disciple and Presbyterian missionary of a Church (Interviewee SB001, 2004). In 1971, a pastor of the Taiwanese Presbyterian Church came to the Shanmei church to preach. He was concerned about the economic situation in Shanmei and indicated that it would be feasible to develop the whole area for tourism by combining Shanmei with other scenic sites or with other Cou villages in

⁶ The mature fruit of local poisonous plants were mixed by smashing the plants with stones. Cou men then poured the squeezed sap into river for a short period of time. The fish become paralyzed by the poison and float to the surface. The fishermen then use a net or single-pointed spear to catch the fish (Hiroshi, 2000). The poison is not strong and the river is flowing; after a certain period of time, the poison flows away and the fish come to life again (M.-H. Wang, 2001).

Alishan Township and to have local people operate the facilities. The idea of using natural resources to develop the economy started to emerge in SB001's mind (M.-H. Wang, 2001).

In 1967, SB001 went to South Africa as a church representative. When he visited a certain ecological park in South Africa, he immediately thought of Danayigu in Shanmei and the story the elder had told him. Danayigu was once a prohibited hunting area because Cou believed there were *hucu* in it. SB001 thought that if Danayigu could be restored and hunting prohibited, the combination of an ecological park and Cou tradition should be a good basis for tourism development (Interviewee SB0017, 2004). Besides, if well protected, the river fish stock would rejuvenate quickly and this could solve the predicament of lack of funds for the development of scenic places (C.-R. Li, 2000).

The environment of the Danayigu River, as with other rivers in Alishan, is the favourite habitat of the Gu fish (*Varicorhinus barbatulus*), or the Cou's so-called "genuine fish". The "genuine fish" is regarded as being the most delicious of all the fish and therefore they are treasured by the Cou (Li and Tang, 1999; M.-H. Wang, 2001). SB001 remembered when he was eight years old, during the dry winter season he could catch the fish by reaching his hands into stone crevices. From 10 am to 5 pm, you could see the glitter of the silver white bellies of the Gu fish as they flipped to eat moss on the rocks, which is an unusual scene. In September and November, Gu fish will find a proper place to spawn. In order to travel upstream, they would leap over obstacles. SB001 figured that if these unusual natural scenes could be restored and managed as sustainable resources, not only would Han Chinese come to watch, but local residents could take advantage of this opportunity to sell local specialties (J.-S. Gau, 1997; Gau, personal interview, 1999, cited in M.-H. Wang, 2001).

To help to realize his dream, in early 1987 SB001 went to the source of the Danayigu River and spent two weeks conducting an environmental survey, thinking of how to restore the Danayigu, planning future scenic spots in Shanmei, and drafting "Bylaws for the Danayigu Self-Administered Conservation District" (C.-R. Li, 2000). However, the idea of reviving the Danayigu River and managing its fish resource was new and was not easily comprehended and accepted by all Shanmei residents. In order to obtain the approval of all Shanmei residents, SB001 started to seek assistance from other important leaders in the community to persuade villagers to agree to the plan to restore the Danayigu River.

The first step was to convince the joint families who owned the fishing grounds on the Danayigu River to turn over the land to the community. Even though the Danayigu River and its surrounding terrain are state-owned and Han people do not acknowledge the Cou's system of property rights (right of use) to the traditional fishing grounds, Shanmei had still maintained such a system. The Danayigu River is 18 kilometres long and was divided into 9 fishing grounds which belonged to the following joint families: *yasiungu*, *tapangu*, *yakumangana*, *yasiugnu*, *e'utsna*, *tapangu*, *e'utsna*, *peongsi*, and *noacachiana* (M.-H. Wang, 1990, p.135). In 1988, a committee consisting of the village head, village affairs officer, chair of the board of directors, the board directors, etc. was established to hold neighbourhood unit meetings and explain the plan. SB001 asked SA003, the chair of Shanmei Community Development Association's (SCDA) board of directors at the time, to persuade the elders of each joint family to contribute their fishing grounds to the project (C.-R. Li, 2000). In the beginning, it was rejected by all the joint families, especially the elders, who believed that such a right cannot be transferred because it was an agreement between the ancestors of each joint family. After three rounds of consultation, conducted with servings of cooked boar meat and rice wine, the promoters had made those elders realize that such family rights no longer actually existed because, according to the law of Republic of China (Taiwan), the river belonged to the government and the new generation did not acknowledge their ancestors' laws and regulations. The promoters also pointed out that after the Alishan Highway had been opened to traffic, many outsiders came in and out of Danayigu freely and used electrocution and poison to catch fish. It was necessary to adopt centralized management measures to prevent such "illegal" entries (M.-H. Wang, 2001). In addition, promoters promised contributors that the SCDA would respect ancestral traditions and reimburse them with pigs or cash based on the area of the land that they contributed. They also convinced the elders with the rationale that the plan was a way of rebuilding Cou culture because Danayigu was a Cou sacred site and reviving the river had the connotation of carrying forward Cou traditional culture. Moreover, they emphasized that the action was in the interests of future generations because agricultural intensification and extension were not good options (C.-R. Li, 2000). Eventually the elders agreed to contribute their rights of river management to the project. But, they still did not know what tourism is or might be. SB001 only told them "Let us make

money from Han people”. It had taken about one year to explain, communicate and convince the elders to relinquish their fishing rights (M.-H. Wang, 2001).

The second step was to persuade the residents who were renting the state-owned forest land along the Danayigu River to stop using the land. The area was over 500 hectares in size and was cultivated with makino and giant bamboos. The committee held neighbourhood meetings to persuade the renters to stop harvesting bamboo and to cease weeding and road construction which facilitated the bamboo harvest. At the time, the prices of bamboo dropped greatly and the land renters were told that even though they had now relinquished their rights and benefits, once the Danayigu tourism initiative was successful, tourists would come and they would make much more profit by running small businesses at the park entrance than through harvesting bamboo. Moreover, revenues from entrance fees would be used for staff wages, environmental improvements and activities in the village (C.-R. Li, 2000).

After almost two years of explanation and communication to reach consensus of the whole village, the Shanmei Cou convened the village assembly and passed the “Bylaws for the Danayigu Self-Administered Conservation District” (Figure 5-2) as follows:

Purpose: Develop tourism industry and promote Shanmei economic growth

Means:

- 1) Establish Danayigu as a natural ecological park;
- 2) Danayigu is collectively owned by the people of Shanmei Village.

Binding agreement:

- 1) Danayigu is collectively owned by the people of Shanmei Village, therefore, the highest authority is the village assembly that authorizes, develops, operates, and manages Danayigu;
- 2) Prohibit investment and development by consortiums, but patronage is welcomed;
- 3) Shanmei villagers between 18 and 50 years old are obligated to protect Danayigu;
- 4) The Shanmei Village area of Danayigu stream is designated as a protected area of Taiwan Gu fish;
- 5) All of the land within six kilometers of the Danayigu River is a protected conservation zone within which all hunting is prohibited.

Penalties:

- 1) For hunting wildlife, the fine is NT\$ 12,000 – 30,000 (CAD\$600-1,500);
- 2) For electrocuting fish, the fine is NT\$ 30,000 (CAD\$1,500) (outsiders are to be sent to the police station);
- 3) For poisoning fish, the fine is NT\$ 50, 000 (CAD\$2500) (outsiders are to be sent to the

police station). After the third year, because the fish population had grown, the figure was adjusted to NT\$ 250,000 (CAD\$12,500);

- 4) For fishing with a hook and for catching fish and shrimps with nets, the fine is NT\$ 12,000 (CAD\$600);
- 5) For picking plants and herbal medicines, the fine is NT\$ 12,000 (CAD\$600);
- 6) If a cadre of Shanmei village violates the stipulation, the fine is double.
- 7) Effective on October 17, 1989.

Committee formation:

- 1) Select one committee member from each community unit. The tenure is two years and is renewable on re-election;
- 2) A director and an assistant director are selected by the committee members;
- 3) The director hires one secretary;
- 4) Set up a person in charge of general affairs and an accountant.

Set up a supervising committee:

The villagers are to select five supervisors. The tenure is two years and is renewable on re-election. A chair is select by the supervising committee members.

Figure 5-2: Bylaws for the Danayigu Self-Administered Conservation District

From C.-R. Li, 2000; M.-H. Wang, 2001

This was the first set of bylaws for indigenous self-administration in Taiwan (Ke, 2002). In addition to the passing of “Bylaws for the Danayigu Self-Administered Conservation District”, regulations were also passed for the Shanmei Tourism Promotion Committee which consists of the village head, the village neighborhood heads and the representatives of each of the neighborhood heads. Thus, the river management group was established (C.-R. Li, 2000).

The Shanmei Cou has made Danayigu their communal homeland and property and, by way of communal resource management, it became a potential tourism destination.

The revival and conservation of the river

Since it would take a year for the Gu fish to propagate by natural growth, SB001 decided to use artificial reproduction. He knew that two places on the Danayigu River had a number of fish: one was *mohohizu* (God’s home) and the other was the Danayigu holy spring. The common characteristic of the spots was that huge rocks stand in great number and outsiders are hesitant to climb. There are springs under the rocks and the fish would move to the fountainhead under the rocks. Only after a poisoned current of water passed them would they swim back to the river (M.-H. Wang, 2001). SB001 had brought the members of the Shanmei

Presbyterian church and his neighbours twice at night to catch both fry and adult fish which were then released into the first and second fish viewing zones (see below). According to their rough estimates, 12,900 fish were released back into the Danayigu River and about 1,900 of them were adult fish. By a cautious estimate, after one year, the fish would increase by ten times, meaning that there would be 19,000 fry. In the second year, the original fry would turn into adult fish which would produce more fry. SB001's conservative estimate was that it would take less than 5 years to have over 1 million fish in the Danayigu River. The number of fish would "explode" and, during the rainy season, fry would be flushed into the Tzenweng River. Therefore, it was said that Danayigu was the home of Gu fish protection (J.-S. Gau, 1997, p.56; M.-H. Wang, 2001).

Demarcation of fish viewing zones and feeding fish

For the purpose of tourism development, three fish viewing zones were demarcated in the lower reaches of the river. In order to make the Gu fish unafraid of humans, SB001 purchased fish food to feed to them. In the beginning, SB001 paid for all the expense of the fish food himself. After a while, he could not afford it and started to seek other financial sources. After he won an individual prize from the Council of Agriculture, Executive Yuan in 1992 for being a model for his promotion of ecological preservation, he invited friends of the Presbyterian Church in Jiayi City to come to Danayigu several times to show them the successful achievement and asked them to donate money to support the plan. The money was used to purchase fish food (C.-R. Li, 2000).

The establishment of patrols

Starting in November 1989, SB001, his sons and several members of Shanmei Presbyterian Church patrolled the river to prevent outsiders and local residents from catching fish. In March 1990, the river management group and the Shanmei Tourism Promotion Committee also voluntarily joined the action. Then more villagers joined voluntarily, patrolling when they had spare time. By the end of 1990, a patrolling team had been formed which consisted of about 70 males aged from 15 to 50 years (C.-R. Li, 2000). The personnel were assigned as one day-time person and two night-time persons. Because residents frequently went to Danayigu, it became a common topic of conversation and a new symbol of identification of Shanmei.

However, the number of volunteer patrolling staff decreased continuously after the first year for a number of reasons. Because the “Bylaws for the Danayigu Self-Administered Conservation District” were in conflict with ROC laws, the patrolling staff did not have clear authority to prevent outsiders from coming to fish. Second, some promoters felt that effective patrolling required massive amounts of manpower and time and, without cash incentives, it was hard to continue only with volunteers. In addition, residents had doubts about whether the conservation action and tourism development could actually succeed. Moreover, some residents felt that fish were for eating and not for being taken care of. In order to maintain the patrols and to reach the goal of tourism development, in 1993, the village assembly passed the agreement to charge a cleaning fee of \$50 (Can\$ 2) per person⁷ (C.-R. Li, 2000).

The volunteer action continued until the end of 1994 when a system was established to hire full-time personnel for the patrols. During the preceding four years, the people involved in the work of fish protection had not been paid and may have actually contributed some cash as well as time (M.-H. Wang, 2001).

The establishment of Danayigu River Ecological Park

After the river protection plan had been in place for two years, the number of Taiwan Gu fish had increased to tens of thousands (M.-H. Wang, 2001). An area was then opened for permit-based fishing as a means of generating funds for the ecological park. During this period, the villagers were hard at work getting the park ready, such as through constructing trails. They did this without external financial support. The park was formally opened to the public in 1995. The following year, the park co-sponsored with the China Times Cultural Foundation, the “First Formosan Taiwan Gu Fish Festival”. The event attracted more than 1000 visitors. “It was on television, and everyone felt that it was something fresh and interesting,” said SB001, smiling proudly at the memory. “It was a big success!” (Liu, 2002b)

The park was further validated in 1997 when Danayigu won an “excellent” community rating from Jiayi County and a special county award for community excellence from the Taiwan Provincial Government. In 1998, the Environmental Protection Administration, Executive Yuan included Danayigu among ten communities that were models of

⁷ At the time, there was no basis in regulations of Republic of China for a community-private-owned park to charge entrance fee. In order to retain income within the community and prevent getting into trouble by charging a fee, Shanmei used the term “cleaning fee” instead of “entrance fee” to prevent attention from the government.

environmental protection. More funding was provided by the Council of Aboriginal Affairs (Council of Indigenous Peoples at present) and Council of Cultural Affairs, Executive Yuan, because it was considered that the fish resource management process of the Danayigu River fully represented “integrated community building” which the government wished to promote (Li, 2002; Liu, 2002). With these affirmations, the community began to obtain more funding for additional construction, such as the widening of Route 129, building a fish-watching bridge, park railings and a ceremonial arch, and paving and repaving the footpaths. Consequently, compared with other communities which also conducted fish resources management, there have been more government subsidies and establishment of public facilities in Shanmei Village, and Danayigu Ecological Park is considered to be the model of ecological conservation, indigenous development and integrated community building in Taiwan (Liu, 2002b). In October 2001, Shanmei won the Mt. Jade Award, one of the Presidential Cultural Awards (Ke, 2002).

Implementation and validation of a fee system

During the period of the Shanmei Tourism Promotion Committee (1989-1994), the purpose of undertaking conservation tasks in Danayigu was further establishment of the tourism industry in Shanmei. Nonetheless, with respect to making a profit, because the committee was registered as an informal organization, it lacked a legal basis for charging a cleaning fee. However an official document on “Integrated Community Building” was released by the Council for Cultural Affairs. To be in tune with this opportunity, a village assembly was held and the decision was made to establish Shanmei Community Development Association (SCDA) and to put the Shanmei Tourism Promotion Committee under this association. Such an arrangement enabled Danayigu to become legal and enabled Shanmei truly to own Danayigu (Li & Tang, 1999, p.16 from Gau’s narrative).

In order to gain an income, the park started to charge a cleaning fee of \$60 (CAD\$2.5) per person. Today, during weekends and holidays, it is \$100 (CAD\$4) per person and a group with 30 people and above is charged \$80 (CAD\$3.20) per person. Students under 15 years old and elders over 65 years old are charged \$60 (CAD\$2.40) per person. During weekdays, it is \$80 (CAD\$3.20) per person and students under 15 years old and elders over 65 years old are charged \$60 (CAD\$2.40) per person. Children under 6 years old are not charged. Parking

fees were \$20 (CAD\$0.80) per motorcycle and \$50 (CAD\$2.00) per car. During certain periods of the year, the area is also open to the public for fishing and a fishing fee is charged. Gu fish fry was also sold to the Gu fish cultivation industry for \$10 (CAD\$0.40) per fry. Fish feed is sold to visitors for \$10 (CAD\$0.40) per package. Soft drinks and spring water are also sold. A fee for hiring a tour guide was introduced in 1998. Once staff salaries have been paid, the remaining income is used by SCDA.

5.6 The Organization: Community Development Association

5.6.1 Organizational Structure and Pattern of Decision Making

The operation of Danayigu Ecological Park is the main task of Shanmei Community Development Association. Significant matters of the park, such as decision making, operation, planning of annual tasks, annual budget and its disbursement, are reported and decided in an SCDA General Assembly. A Shanmei resident automatically becomes a member of SCDA when they become 20 years old (Shanmei Community Development Association, 1999-2000; 2001; 2005a). They do not need to pay a membership fee because the revenue from the park makes this unnecessary. With regard to the formulation, execution, verification, and supervision of the park's plan, the board of directors and the board of supervisors are in charge (Shanmei Community Development Association, 1999-2000; 2001; 2005a). There are 15 board directors including the chair and 5 supervisors. They are elected by all registered Shanmei villagers over 20 years old every two years through the General Assembly, not by customary procedures (Shanmei Community Development Association, 2005a). The chair of the board of directors is elected by the 15 board directors⁸ (Shanmei Community Development Association, 1999-2000; 2001; 2005a). These people and the director of the park are all Shanmei Cou and they have enormous decision-making power with regard to park management and community development. The opinions of elders and knowledgeable youth from outside have a very limited effect on decision making.

⁸ Being the chair of the board of directors of Shanmei can control many resources (a large amount of funds). Several villagers indicated that at present, the election of the board of directors is manipulated. Villagers are told by candidates that they will be "rewarded" different kinds of benefits after the election (such as job opportunities). Also, a few individuals have grasped power all the time. Two individuals have served seven terms as the chair of the board of directors starting from 1993 to 2005.

Under the organizational structure of SCDA, the management station of Danayigu Ecological Park was established and it hires full-time management and patrol staff (Figure 5-3) (Shanmei Community Development Association, 1999-2000; 2001; 2005a). These positions are slowly increasing in number over time, depending upon business volume and the available budget, with the intention of enhancing the talents of the younger generation within the community.

Under the SCDA organizational structure, an agricultural group was established to guide cultivation, production and marketing of agricultural products. Some of these agricultural activities take place within the park. The group is comprised of classes for the production of tea, flowers, vegetables, orchard, Gu fish cultivation, bamboo shoots processing, native plant herbal medicine and a recreational farm (Shanmei Community Development Association, 2005a). However, most of them do not operate well. The quantity of handicrafts, vegetables, and fruits that Shanmei Cou produce and grow cannot keep up with the demands of visitors. Compared with running businesses and doing casual labour, these livelihood activities take longer to gain cash.

Under SCDA, Shanmei Community Share Cooperative (SCSC) was established in December 2004 to take charge of affairs in the park (please refer to Appendix D for detailed information). The purposes are to avoid taxation and to take on projects from outside to increase work opportunities in the community (Figure 5-3). The cooperative is also expected to contract with middlemen about providing fixed and/or acceptable prices for agricultural products to protect villagers from exploitation (Interviewees SA002, SD010, 2005).

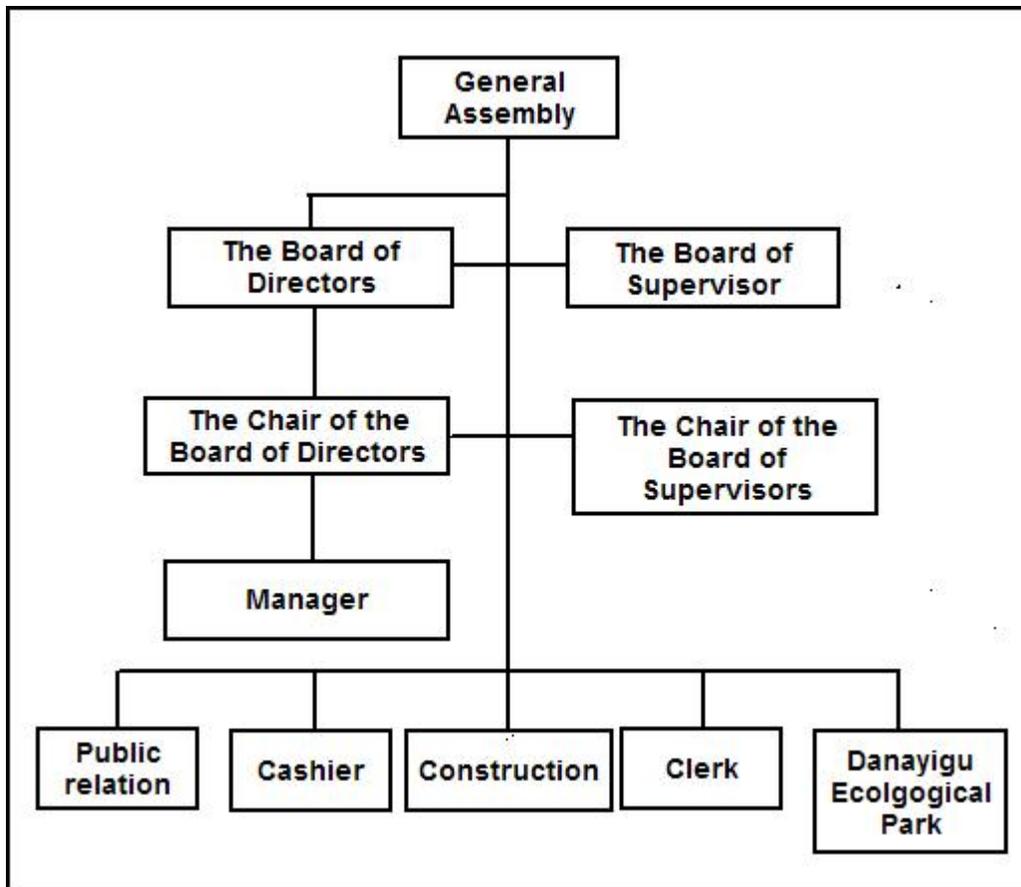


Figure 5-4: The Organization Structure of Shanmei Community Share Cooperative (As of July 2005)

From Shanmei Community Development Association (2005b)

5.6.2 The System of Benefit Sharing and the Operation of Community Institutions

The accumulated revenue of Shanmei in 2004 was NT\$ 20,686,290 (CAD\$ 827,452) including the income from Danayigu Ecological Park (80.1%; NT\$ 16,562,776 (CAD\$ 662,511)), government subsidies (5.1%; NT\$ 1,050,710 (CAD\$ 42,028)), interest (0.9%; NT\$ 181,638 (CAD\$ 7,266)), others (2.5%; NT\$ 524,632 (CAD\$ 20,985)), and the balance brought forward from 2003 (11.4%; NT\$ 2,366,534 (CAD\$ 94,661)) (Shanmei Community Development Association, 2005a). Shanmei Community Development Association takes the profits generated from Danayigu Park and subsidies from government organizations and uses them for community development, job creation and the provision of social services. The

money distributed can be grouped into 8 categories⁹ including personnel expenses, office expenses, agency costs, social services, conservation fee (wages of patrolling staff), community dancing league, the fund for the Gu Fish Festival, and income taxes (Figure 5-4) (Shanmei Community Development Association, 2005a). Through the system of benefit sharing, a variety of livelihood resources has been generated including economic capital, social capital, physical capital and human capital (Interviews, 2004, 2005; Shanmei Community Development Association, 2005a). This will be further elaborated in the section 7.4.2 of Chapter 7.

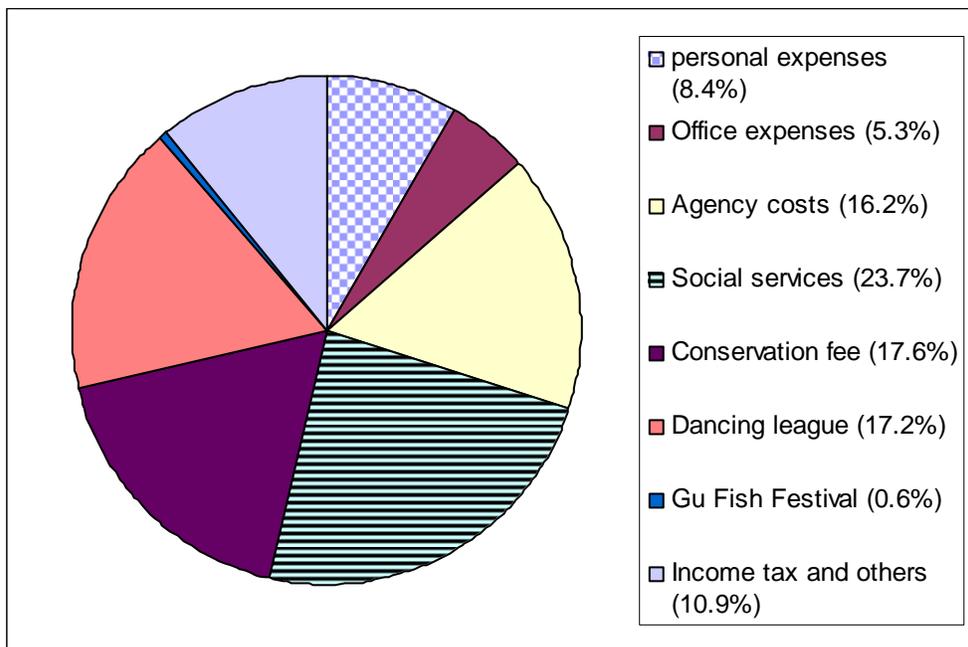


Figure 5-5: 2004 Accumulated Expenses of Shanmei

Adapted from Shanmei Community Development Association (2005a)

Personnel and office expenses

Seven persons were paid to work in the association in 2004 including one general executive, one secretary, an accountant, a cashier, a general assistant and two clerks. Office expenses included a number of items. The public relations fee in office expenses refers to the expenses incurred in catering to government officials and honoured guests. Only the Chair of the Board

⁹ The condition of obtaining benefits from the community welfare system is that you must have your household registration in Shanmei. If your spouse is a Han person, you may not be eligible for subsidy.

of Directors has the right to use the money (NT\$ 350,000/year (CAD\$ 14,000)) (Shanmei Community Development Association, 2005). With regard to meeting fees, NT\$ 1000 (CAD\$ 40) is provided to each member of the board of directors and supervisors (20 persons) at formal meetings (4 times/year). Fees are provided to community cadre and villagers who attend community-related meetings (NT\$2000/person (CAD\$ 40)) (Shanmei Community Development Association, 2005a).

Agency costs

This category includes costs incurred in the park and for several community development plans. Costs in the park include insurance, advertising, fish food and land rentals (Shanmei Community Development Association, 2005a). Two villagers were paid for the use of their lands in the park as parking lots. Community development plans include those for recreation, agriculture, industry and cultural industries. Farming is encouraged by providing each neighbourhood unit with items such as fertilizer, nursery stock, flowers and plants, and irrigation pipes (Shanmei Community Development Association, 2005a). To promote cultural industries, the community invited experts and scholars to teach them how to commercialize Cou culture to make income, such as through the production of Gu fish-related handicrafts and T-shirts and a recording of the community's choir.

Social services

Welfare

Subsidies include day care fees for the nursery, scholarships for students from primary school through high school to university, gifts of money to newlyweds and the newly born, emergency relief funds, subsidies for medical treatment and funerals, and even monthly stipends of NT\$1500 (CAD\$75) for the elderly. Individuals who are cultural workers or continue to carry out agricultural activities are also subsidized (Shanmei Community Development Association, 2005a). The amount of shared benefits are decided and adjusted by the board of directors. They partially complement government welfare systems for children, students and the elderly in the village (Table 5-3). For example, a child's day-care fee for one semester is about NT\$ 8000/person (CAD\$ 320). The subsidy from the Council of Indigenous Peoples is NT\$ 6000/person (CAD\$ 240) (Interviewees SE008, SC005, 2005). SCDA, therefore, subsidize NT\$ 2000 /person (CAD\$ 80) to make up the gap (Interviewee SD019,

SC005, 2005). Subsidies are also provided for lunch fees of students in Shanmei public school, a monthly stipend to the elderly over 55 years old, and tuition fees of students from public school through high school to university (Informal interviews, 2004, 2005). The system contributes to cash-strapped families with several children in school and to old people. On the other hand, some cadres of the village commented that some residents have already formed a mentality of completely relying on the community and have passed on the responsibility for raising their children to the schools and to the community (Interviewees SA006, SC001, SC005, 2004; 2005).

Table 5-3: Subsidy Program of Shanmei Community Development Association to Different Groups

Age	Amount of subsidy/person	Note
3-6 (pre-school)	NT\$2,000 ^a /term	Based on application
6-12 (public school)	NT\$300/month	Lunch fee, based on application
12-15 (junior high school)	NT\$2,000/term	Based on application
15-18 (senior high school)	NT\$3000/term	Based on application
Over 18 (college)	NT\$6,000/term	Based on application
Equal and over 60	NT\$1,000/month	Granted
Equal and over 70	NT\$1,500/month	Granted

Note. ^a Currency rate: CAD\$1= NT\$25. From interviewees SC005, SD012, 2005; informal interviews (2005)

Institutional operations

Community organizations and institutions are also subsidized, such as the long-life club, the youth club, the mothers' classroom, the class of Cou Culture Study, and village and township sports (Shanmei Community Development Association, 2005a). These activities have helped to revitalize some traditional skills and knowledge, such as weaving and craft making in the long-life club, native plants identification and investigation in the mothers' classroom, and to integrate them into the modern society (Shanmei Community Development Association, 2005a). Crafts that are made are sold to tourists. The result of the investigation of Cou native plants was used to establish the Cou Native Plant Garden in Danayigu Park for educational purposes. The activities have also provided training to enhance the talents of the younger generation. In the dancing league, the responsibility for teaching dance is given partially to the younger generation to develop a responsible attitude and a feeling that they are passing on traditional Cou culture (Interviewee SA015, 2004; 2005).

The association has cooperated with the Cou Tribal Community University to run several classes in the village that have included the study of Cou culture and history,

interpretation (i.e., interpretative skills, flora and fauna, ecology), natural resource management (i.e., Gu fish management and cultivation) and leather carving. In the class on Cou culture and history, through interviewing local elders, young and middle-aged villagers have furthered their knowledge of their own culture and history. The interpretation class provided training in interpretative skill development. The activities included on-site interpretation to groups and answering questions from visitors. The content of interpretation included the origin and significance of the park, Cou history and culture, and native wildlife and plants (Interviewees SD004, SD005, 2005). The program was designed to motivate villagers to learn more about their own culture, strengthen their communication skills and increase self-confidence and pride. It also brought new ideas into the village. The lecturer of the class (Interviewee SD018, 2005) commented:

“It has been over 10 years since the establishment of Shanmei Community Development Association. All affairs of Shanmei are decided by 16 persons including the 15 board of directors and the director of the park. They have not been re-educated. I hope the members of the class can bring new ideas into the community to break the restrictions of the current rigid development mechanism, community institutions, and constraint of traditional family life (between sub-clan and household)... Take the incumbent village head as an example: being an interpreter has made him see a number of problems in the community and he decided to run for village head. Certainly not all classmates have the intention to be involved in community politics, but through the class they can develop sidelines and have a better life [sic].”

A few members of the interpretative class proposed that a class on Gu fish management and propagation should be arranged (Interviewees SA002, SB002, SD006, SD018, 2005). They planned to invite fishery experts to share their expertise on how to manage the Gu fish resource including its propagation, display and by-products. From the view of the director of the park and the board of directors, the present quantity of Gu fish is not enough and only one-fifth of that at its peak period (Interviewee SA002, 2005). The manager of the Fresh-water Fishes' Museum in Taipei, on the other hand, indicated that the quantity should be reduced by half, so the food for fish would be enough (not including fish feed) and the fish would grow bigger, healthier and more vigorous. It was suggested that old Gu fish could be netted to create by-products, such as salted fish for sale, placing them into

experience pool or displaying them in an aquarium to demonstrate river ecology (Interviewee SD018, 2005).

Community building and construction provide occasional job opportunities

The annual budget that is allocated by the General Assembly has continually increased. In the last two years, SCDA's development strategy has been to expand the tourism resources of Danayigu Ecological Park, which is the central point of Shanmei, to the entire village (Shanmei Community Development Association, 2004; 2005a). The living space of each neighbourhood unit outside of the park has been planned to create public space and to shape its own characteristics based on each neighbourhood's decisions (Interviewee SC001, 2005; Shanmei Community Development Association, 2005a). Part of the revenue was distributed to each neighbourhood to carry out the plan of the SCDA and to fulfill residents' needs. Seventy percent of the fund is for construction while the rest is for activities (Interviewee SC001, 2005; Shanmei Community Development Association, 2005a). For example, neighbourhood unit one has been constructed as a garden-homestay area with Cou-style pavilions and handicraft studios. In 2003, it received subsidies to create flower beds and to plant flowers and certain households were provided with funds to construct food stalls (Interviewee SA009, 2004). Every household in neighbourhoods four and five were given money for building materials to repair their roofs, walls and floors (Interviewee SA009, 2004). This also achieved the objective of environmental beautification. For neighbourhood six, the development emphasis is a combination of BBQ, camping and Cou cultural experiences in Cou-style guest houses. Accordingly, the money was spent on guest house construction¹⁰ (Interviewee SA009, 2004). The previous chair of the board of directors (SA003, 2004) commented that even though the construction fund is provided to each neighbourhood unit every year, the output is small. The fund also contributes to the maintenance of public facilities in the community and the park. In the community, the environment surrounding the multi-functional activity has been beautified and country roads have been maintained. In the park, the tasks include maintenance of trails, food stalls, restaurants, parking lots, the administration station, washrooms and pavilions (Shanmei Community Development Association, 2005a). The tasks described above provide a number of short-term opportunities for villagers to earn cash.

¹⁰ Several villagers expressed that the community should invest more money in children's education, public facilities, and in the enrichment of the cultural and interpretative facilities and programs in the park, such as a museum of cultural and historical relics, rather than distributing the money to each neighbourhood.

Cou cultural, religious and community activities

Funds are also provided for Cou family shrines and to the Catholic, Presbyterian and True Jesus churches (Shanmei Community Development Association, 2005a). Fees for activities in Shanmei Public school, such as for parent-child education and to promote village sports are also paid by the association (Shanmei Community Development Association, 2005a).

Conservation fee and community dancing league

Nine formal staff were paid to work in the park in 2004, including one director, six patrol staff, one gate keeper/entrance fee collector and one plant tender /janitor. Costs also include substitute employees, overtime pay and bonuses. With regard to the dancing league, the standard number of dancers (both formal and informal) is 30. The wage is NT \$1200 (CAD\$ 48)/person/day (interviews, 2004, 2005). The director of the league is paid NT\$1300 (CAD\$ 52)/day (Interviewee SD010, 2005). Other related expenses include cloth, stage props and maintenance fees (Shanmei Community Development Association, 2005a).

Formosan Taiwan Gu Fish Festival

The Gu fish festival has been held annually for 10 years. It has been subsidized by several government organizations. It usually lasts for one week. In 2001, the Gu Fish Festival in Shanmei re-introduced a river ritual which had not occurred for 50 years (Shanmei Community Development Association, 2005a). The elder of every family made offerings to *ake'coyaha* (the spirit who manage rivers and creeks) and prayed for the increase of the fish stock and the safety of people who cross and swim in rivers. A number of activities were also held to make profits, such as Cou traditional archery, an exhibition and sale of handicrafts, demonstration of handicrafts making and jelly fig DIY(do it yourself). Villagers were assigned the tasks and paid by the community.

5.7 Overview of Current Livelihoods

After nearly 20 years of development, Shanmei villagers applied Cou traditional knowledge, by way of protecting and using natural resources as attractions to develop tourism in pursuit of the goal of economic development (Shanmei Community Development Association, 2005b). The Dayayigu Ecological Park has brought in a large number of visitors, as well created a number of opportunities for employment and cash earnings. The setting-up of Shanmei

Community Development Association and the operation of its institutions have effectively planned and used income generated from the park and enabled the majority of Shanmei residents to benefit from the achievements of tourism development to some extent. Examples range from the improvement of the infrastructure of each neighborhood unit, to enhancing local quality of life, to enriching tourism content by training the talents of those in tourism undertakings (interviews 2004; 2005). Almost every household in Shanmei has a connection with the park and an increasing number of local livelihood activities is directly or indirectly related to tourism. This section will examine how tourism activities have been incorporated into the overall livelihood spectrum of Shanmei. More specifically, their significance in terms of meeting different kinds of needs will be explored, as well as their potential competition or complementation with other economic activities, and their contributions to local livelihoods. The accumulation of new livelihood resources and the extent to which tourism development and management have been experienced by different groups (mainly by sex and age) as positive (opportunities, benefits, and/or advantages) or negative (threats, costs, and/or disadvantages) on individual, household, and community scales will be examined.

5.7.1 Introduction

Most households rely on a combination of activities to meet their needs and to disperse risk. A wide range of resources and livelihood strategies are employed by Shanmei households: migration, wage employment (regular and occasional), crops production, livestock, harvesting of trees, plants and mountain resources, fishing, hunting, and tourism enterprises. The significance of tourism activities to villagers is assessed below in the context of this wide array of livelihood strategies.

The needs of rural households can be divided into physical needs – food, energy, water, shelter – and other livelihood needs – cash, reserves, typhoon-coping strategies, production inputs, intangible assets (e.g., community membership) and community strength. The contribution of each economic activity, especially tourism-related activities, to some of the needs is reviewed.

Households in Shanmei have had increasing needs for cash. Rural families now use money to purchase necessities, including food, because not enough is grown, reared, or collected at home; for paying school and clinic fees, for buying clothes, and for purchasing

small daily needs such as soap and oil, as well as for large items including motorcycles and cars. For a decreasing number of villagers who are still engaged in farming during certain times of the year, money is invested in new crops, fertilizer, labour, pesticides and tools. Individuals who run lodges, restaurants, food stalls and cafes, inside and outside the Danayigu ecological park, purchase ingredients (e.g. vegetables, fish, meat) in nearby towns or in Jiayi city. As indicated in Table 5-4, almost one third of the Shanmei population is not in the workforce, including pre-school children (7.0%), students (12.9%) and residents who are retired, unable to work or disabled (10.2%). Nearly one fourth of the Shanmei population make a living outside of the village. Less than half of the population with working ability reside in the village.

Table 5-4: The Distribution of Shanmei Workforce and Non-workforce

	<u>n</u>	<u>%</u>
Preschool Children	47	7.0
Students	86	12.9
Retired, unable to work, & disable	68	10.2
Migration	162	24.3
Pop. with work ability reside in the village	305	45.6
Total	668	100.0

Note. Based on interviews conducted in November 2005, the situation changes from time to time

Two major observations are of note. First, it is mainly males who have migrated out of the village and who make a living undertaking heavy labour. The majority of females are responsible for domestic work, office jobs and other casual labour in the village. Second, the majority of the younger generation (under 35) have obtained their formal education outside of Shanmei. They have not learned traditional knowledge from the elders on how to farm or hunt or how to weave and make handicrafts.

Table 5-5 provides an overview of economic activities in Shanmei village and their proportional distribution. The activities are divided into two categories: non-tourism related activities and tourism-related positions and activities. In all livelihood activities and strategies, migration accounts for the largest proportion (38.8%), followed by employment (29%), primarily by odd jobs and labour (21.0%). The range of the proportion of tourism-related positions and activities is from 17.3 to 29.8%, but steady positions, paid by Shanmei Community Development Association (SCDA), employ less than one tenth of the Shanmei

labour force. The proportion of regular and part-time positions, not paid by SCDA, can reach up to 16.9%, but the figures are extremely unstable, depending on the number of visitors. Agriculture and forestry industries that mainly supported most households in the past, now account for about one tenth.

Table 5-5: Economic Activities of Shanmei Population with Work Ability

				<u>n</u>	<u>%</u>
Total				467	
Non tourism related activities	Migration	With productivity		143	34.7
		Without productivity		19	4.1
	Employment	Permanent jobs in Alishan area		25	5.4
		Odd jobs & labour		98	21.0
		Army		12	2.6
		Retail businesses		12	2.6
		Farming (crops & livestock) & harvesting (bamboos & mountain products) for cash		60	12.8
		Hunting		12	2.6
		No work		8	1.7
		Un known		53	11.3
Tourism related positions & activities	Under and paid by Shanmei Community Development Association (SCDA)	Employment in Shanmei Community Development Association		8	1.7
		Employment in Shanmei Community Share Cooperation (SCSC) and Danayigu Ecological Park		33-53	7.1-11.3
			Sub total	41-61	8.8-13.1
	Under SCDA, not paid by it, and inside the park	Interpreters, restaurants, food stalls, and handicraft stores		17-40	3.6-8.6
	Not under SCDA and outside the park	Self-run enterprises including lodges, restaurants, homestays, campsites, and cafés		23-38	4.9-8.1
			Sub total	40-78	8.1-16.9
			81-139	17.3-29.8	

Note. Based on interviews conducted in 2005, the situation changes from time to time

5.7.2 Livelihood Activities Not Related to Tourism

Crop production

Benefits

1) *Subsistence Food*

Almost every household produces several kinds of vegetables. Females, especially those middle-aged and older, plant vegetables for consumption by themselves and their families. The main input to crop production is labour (particularly women's labour). The majority of residents under age 40 are not engaged in agriculture. The diversity and quantity of the crops produced in the majority of households in Shanmei are insufficient for them to be self-sustaining. Therefore, they purchase additional food from a truck from Jiayi City which arrives every morning, from friends and relatives in other Cou villages, or they go to the city and purchase foodstuffs there.

2) *Cash Crops: Cash Income*

Most fields in Shanmei are covered with a variety of bamboos (i.e. makino bamboo, giant bamboo, moso bamboo, and Leleba Oldhami Nakai). In recent years, the following crops have also been cultivated: mountain tea, jelly figs, camellia oil, ginger, taro, peas, hot peppers, coffee and a variety of fast-growing vegetables (informal interviews, 2004; 2005). The government also encourages the growing of custard apples and peaches but has not provided long-term guidance on how to tend fruit trees, manage orchards and find marketing channels. Many custard apples are left unpicked and untended because villagers do not know how to prevent and cure pest and disease damage effectively (Interviewee SD015, 2004; informal interviews, 2005). These tasks need professional intervention and the investment of time and money. Currently only one Han household in Shanmei makes its livelihood relying on agriculture. The few Cou households that make a living mainly by selling cash crops usually cultivate multiple crops to reduce the risk due to fluctuating market prices for different items (Interviewees SD001, SE004, 2004). Under a system of collective transportation and sale, crops produced in Alishan are carried to Chukou (about a 1.5 hour drive from Shanmei) and Jhongpu for packing or may be delivered to big cities directly (Interviewee SE002, 2004). Some cash crops can be left in the soil for a while (e.g. ginger) awaiting a better market price (Interviewee SD001, 2004). Some villagers promote their crops by e-marketing, encouraging

customers to come and harvest them themselves. However, the majority of Shanmei villagers have gradually come to rely on occasional wage employment as their main livelihood activity and agricultural activities have become side-lines occupation.

Tea production

The process of tea production is tedious. It includes land clearing, cultivation, fertilization, weeding, leaf picking, carrying tea leaves to processing factories, packaging, and finding a market. It also requires knowledge of different species of tea shrubs (Interviewee SA009, 2004). Some Shanmei Cou in neighbourhood unit one started to learn tea production from Han people as tea pickers (Interviewee SA009, 2004; SA016, 2005). Tea production is a labour-intensive business. People who run tea businesses work day and night in the busy season. During the day, they need to work on the tea plantations and, during the night, they need to work in tea processing factories. Such a workload can seriously affect their health. Good interpersonal skills are necessary to find labour to pick tea leaves, to arrange time to process tea leaves with processing factories and to find a market. Individuals who run tea-producing businesses in Shanmei co-operate when much labour is needed in the leaf-picking season. The production of tea has greatly changed the traditional farming lifestyles of certain Shanmei residents. They have had to learn how to plant and fertilize tea trees, weed, pick tea leaves, transport them to tea processing factories and sell them. It has been a self-learning process (Interviewee SA009, 2004; informal interviews, 2004; 2005).

Residents in neighbourhood unit one who own tea plantations need large amounts of cash to pay for labour in certain seasons of the year and to purchase fertilizers and pesticides (Interviewee SA009, 2004). Tea picking usually occurs three or four times annually, depending on precipitation, market price and the availability of cash, labour and time (informal interviews, 2004; 2005). If labour and cash reserved are insufficient, plantation owners would rather sell unprocessed tea leaves, which are less than half the processed price, or lease the land to others to run a tea business. However, if the rent offered is too low, they would rather leave the tea plantations unattended and lose their investments. This happens quite often to Shanmei residents because they had little money and marketing skills to start with (Interviewee SA009, 2004).

In the 1990s, tea was low in production but high in price and the cash earned covered daily necessities and children's school fees for some households in neighbourhood unit one

(Interviewee SA009, 2004). In recent years, the price has not been as good but the cash earned still helps to cover part of the costs of daily necessities for a few households. Fewer and fewer residents are becoming involved in the production of tea.

Recognizing the inflow of tourists and inspired by the possibilities of tourism development, several households in neighbourhood unit one who own tea plantations have started to convert small parcels of land to pick-your-own orchards, planting plums, mulberries, apricots and peaches. The strategy has basically been one of trial and error. They usually start with a small portion of the land and with one or two kinds of fruits. When demand increases, they expand the area of the orchard and plant more kinds of fruit (Interviewees SA009, 2004; SA016, 2005). The benefits of planting these fruits are multiple. First, unused land is re-used. Second, the orchard flowers can be another tourist attraction in early Spring. Third, the fruits can be harvested for reciprocal exchange or sold for cash. More and more households in neighbourhood unit one plan to expand their orchard area (Interviewees SA016, SD017, 2005). They hope that they will become an attraction of Shanmei in the future.

Planting wasabi

Many households plant wasabi at high altitudes on Ali Mountain to earn cash. It takes about 2-3 hours for a one-way drive from Shanmei to the wasabi field, reducing time spent with family (Interviewees SA013, SD015, 2004; SE010, 2005).

Betel harvesting

Several households own betel plantations. In recent years, the market price of betel has dropped and most of the households do not want to invest more time, money and labour on the plantations. In consequence, they lease out their betel plantations to middlemen. In this way, they do not need to worry about processing the betel and marketing it. The contract prices depend on the period and the size of the area rented. A few individuals do the labour themselves. They harvest betel and sell them directly to a wholesaler. In this way, they can earn more profit (Interviewees SA015, 2004; SC007, 2005).

3) Reciprocal Exchange

Reciprocal exchange and barter used to be crucial to obtain daily necessities in the Cou tribe. Even though nowadays food can be purchased easily, exchange of vegetables and fruits with family members or neighbours is still common.

4) Surplus Crops are used to Feed Livestock

Surplus crops, damaged fruits and crops with unexpectedly low market prices are used to feed livestock or are not harvested.

Even though Shanmei livelihood activities have evolved from mainly agriculturally-based activities in the past to mixed activities at present, growing crops is an essential livelihood component for virtually all rural households. Crops are grown to: 1) provide a portion of staple food requirements; 2) to minimize the need for cash for survival; and 3) to generate cash.

Disadvantages

In recent years, due to fluctuations in market prices, the remuneration obtained from agricultural products often has not covered the expenses of labour, money, and time invested through out the year. Besides, the quantity of the harvest on the mountain is less than on the lowland and costs are higher (interviews, 2004, 2005).

Livestock

Benefits

Subsistence Food and Cash Income

Almost every household in Shanmei raises chickens but a declining number of households raise pigs because they need a lot of feed and space, and their excrement is large in quantity (informal interviews, 2004; 2005). Since Alishan Township is located in the protected headwater area of the Tzengwen Reservoir, raising pigs on a large scale is forbidden because it produces a large amount of wastewater. Villagers own pigs and chickens for different purposes. Pigs and chickens are for self-consumption and also for sale to generate cash. A small proportion of pigs and chickens is used to supply tourism enterprises, such as restaurants and food stalls inside and outside of the park. Some residents raise them in sties and cages, whereas others use free range. Villagers purchase little chicks to raise from the food truck that arrives from Jiayi City every morning or from the market in the city directly (Interviewees SA011, SD009, 2005). The inputs are wild plants mixed with purchased oatmeal and household labour. Pigs are raised for multiple purposes, including physical needs, as well as social and cultural activities. A whole pig is usually purchased for ceremonies and important events when a number of people are invited, such as for weddings and visits of guests. A pig

is usually too big for a household to consume by itself; therefore, when an owner decides to butcher a pig, they usually inform the entire village that pork is for sale (Interviewee SA008, 2004). At present, only a few households raise pigs in areas far from dwelling places and restaurants.

Hunting

In neighbourhood unit 7, a team of hunters often uses a group of hunting dogs to hunt. Most of the time hunters drive a truck instead of walking and use modernized equipment such as two-way radios and rifles instead of traditional hunting tools such as knives, bows and arrows, and spears. Less frequently, hunters travel long distances (2-3 day walk) along traditional hunting trails.

Benefits

1) Subsistence Food and Cash Income

Hunting is no longer essential training and a livelihood activity for Cou males, but certain gifted individuals still go hunting during their spare time for personal interest. The group of hunters in neighbourhood unit 7 still maintain part of the Cou traditional hunting culture (Interviewee SC001, 2004). Participants in the team share part of the game no matter whether or not he catches it (informal interviews, 2004, 2005). Game includes wild boars, birds (both local and migratory), hair-foot flying squirrels, regular squirrels, owls, Formosan Reeve's Muntjaks (vegetarian barking deer), etc. Also, game sold to markets outside the village provides a source of income to several households. The hunting leader of the crew indicated that almost 80% of game is sold to game restaurants along the Alishan Highway (Interviewee SA019, 2005). The profit is lucrative especially during the holiday season (Interviewees SA019, SA022, SC002, 2005) .

2) Cultural Significance

The teeth of wild boar, feathers of certain birds, the skin of Formosan Reeve's muntjac and mountain goats are worn on traditional and commercial ceremonial occasions, such as war rituals (*mayasvi*) and the Fona (“bean of life”) festival. Due to the Wildlife Conservation Laws, residents hesitate to show their new hunting “trophies” (Interviewee SD003, 2004).

Disadvantages

The previous village head SB001 commented that lumbering original forests, afforesting with new species and over-hunting have reduced the number of migrating birds that come to the three southern Cou villages (i.e, Shanmei, Xinmei, Chasan). This hampers the long-term planning of ecotourism development through activities such as bird watching. Certain species of migrating birds used to come in flocks. A few years ago, a hunter could shoot 100 birds in a day and sell them at NT\$100 (CAD\$ 4)/bird and make a big profit. In recent years, the number has been reduced to 20-30 birds per day.

Harvesting of trees, plants and mountain resources

Benefits

Subsistence Food and Cash Income

Food gathered for self-consumption includes honey, medicinal plants, rattan, jelly figs, and a variety of bamboos. The mountain products are also sold to other households. Harvesting makino and giant bamboos planted by ancestors used to be the main income source for Shanmei residents (informal interviews, 2004, 2005). The cash earned by selling two trucks of bamboo shoots used to be able to cover the school registration fee for a semester but that is not the case now (Interviewees SC001, SC001, 2004). Nonetheless, as tourism enterprises increase in Shanmei, the resources can be harvested and sold to tourists directly or processed as new products with added value. For example, bamboo shoots are made into different dishes and sold in restaurants and eateries. After initial processing, barrels of bamboo shoots are sold to tourists directly.

Freshwater fishing

Benefits

Subsistence Food and Cash Income

Fish and shrimp caught in or near Shanmei are for self-consumption and for sale to neighbours. Residents in certain neighbourhood units still use nets, electrocution, poison and even dynamite to catch fish in the upper and lower reaches of Danayigu River and in other tributaries of Tzengwen River where they cannot be seen (Interviewee SD007, 2005). The association has ignored the situation and patrolling staff do not actively ban the behaviour either (Interviewees SD007, 2004; SD010, 2005). As a result, fish quantity is now only one

fifth of that after the peak period (i.e., after river protection for 3 years) (Interviewee SB001, 2005). Even though the director of the park explained that most fish have been flushed away by heavy rain brought from recent typhoons, that is not the only factor.

According to the observations of a fishery expert, the Gu fish now in the Danayigu River are not originally from that river (Interviewee SD018, 2005). The point was further confirmed by the previous village head SB001 (2005). The previous chair of the board of directors and the director of Danayigu Park purchased Gu fish from a nearby township and released them into Danayigu River to maintain fish quantity. A shaman (SA012, 2004) of Shanmei commented that over a half of the Cou population does not have a conservation concept. To some villagers, the value of fish and animals on plates surpasses the value of watching them and they choose to catch rather than protect them (Interviewee CA002, 2004). SB001 (2005) commended that the Cou fishing tradition has totally disappeared in the younger generation. Use of electrocution and poison to catch fish are also common in other Cou villages, such as in Chashan, Xinmei and Lijia.

Owners of restaurants, eateries and food stalls did not indicate directly the sources of Gu fish and river shrimp that they sold but they mentioned that they purchased them from outside of the village. However, a few villagers said that a big portion come from nearby tributaries of the Tzengwen River (informal interviews, 2005).

Constraints or benefits?

Typhoons

Every year, typhoons in Taiwan bring a number of rainfalls that affect fish stock levels by flushing them away and changing their habitats. Reduction of fish quantities in the tributaries of the Tzengwen River (e.g., the Danayigu River) usually causes residents to fish in other tributaries and lower reaches of the Tzengwen River or to buy fish in nearby villages. Due to the conservation of the Danayigu River, villages located in the lower reaches of the Tzengwen River directly benefit from the fish stocks flushed from upstream. A villager SD024 (2005) suggested that the typhoon season is a time for river fish and shrimp to recover for, in the absence of tourism, the demand decreases.

Wage employment, migration and cash remittances

Regular cash income

Permanent Jobs in the Alishan Area and Retail Businesses

As indicated in Table 5-5, among the 467 Shanmei residents who reside in the village and have the ability to work, only 5.4% (n=25) have regular jobs paying wages. The majority of them are civil servants, including staff of Jiayi County Government, Alishan Township Administration and Alishan Farmers' Cooperative. Inside the village, four police officers and another worker are based in the police station. Shanmei Public School and nursery hires 13 people, including a principal, several teachers, one cook, and two other workers. Two nurses work in Shanmei Clinic. A village head and a village affairs officer work in Shanmei Village Administration. With regard to retail businesses, Shanmei has seven grocery stores and three pedestrian eateries that mostly provide breakfasts and lunches.

Wage employment (casual labour)

Shanmei is located close to the Alishan Highway and a number of occasional job opportunities are available along this route. At least one fifth of villagers with work ability (21%) are engaged in casual labour periodically. Villagers, in general, like freedom and an unconstrained lifestyle. Some young to middle-aged males (under 40) have no long-term goals and stay home doing nothing until they need cash. Then they start to look for casual labour (informal conversation with middle-age villagers, 2004; 2005). Often, a large amount of the money earned is spent on alcohol and karaoke. Other older villagers (usually over 45) are engaged in different activities according to the agricultural seasons.

Casual labour, even though unstable and often physically demanding, has several advantages that fit with villagers' needs: 1) cash can be obtained at once (paid by the day); 2) it requires little responsibility unless one is a foreman; 3) it is very flexible in terms of time arrangements; and 4) it does not require new or advanced knowledge and skills. The disadvantages are that the work is unreliable and villagers have to search constantly for jobs. Having good connections, therefore, is beneficial (informal interviews, 2004, 2005).

Picking Tea Leaves, Weeding and Carrying Fertilizer

Picking tea leaves, weeding and carrying fertilizer in tea plantations are common casual labour in the Alishan area. The majority of tea plantations are owned by Han people. The

plantations are distributed in the high altitudes of Alishan and Samin Counties. Tea-leaf picking can be required three or four times yearly. It is usually women's work. Drivers are usually men who carry the labourers for tea-leaf picking (Interviewee SA009, 2004).

Weeding and planting flowers along the Alishan Highway are also common short-term employment opportunities. The wage is usually over \$NT 1500-2000 (\$CAD 60-80)/day. Weeding and carrying fertilizer have high labour demands.

Making Tea

Making tea requires skills. The wage depends on the amount of tea made, sometimes NT\$ 2000-3000 (CAD\$80-120)/day or NT\$ 1000 (CAD\$40)/day (Interviewees SA009, SC001, 2004).

Construction, Building Houses and Indoor Decoration

Projects often occur in the Alishan area, such as road repairs and building retaining walls and silt arresters. These projects create casual labour, such as operating excavators and making concrete forms. Private businesses and households need labour for building houses and indoor decoration (informal interviews 2004, 2005).

Staff of the Cou Culture and Arts Foundation

Established in 2001 in Leye, the aims of the foundation are to collect, study and revitalize Cou clan culture, and to promote cultural exchanges and communication. The main tasks are to promote Cou culture and arts and pass them on, to establish the Cou Kuba Tribal Community University and open courses in each Cou village in an attempt to link the traditional education of the Cou with the education of mainstream society and to prepare for Cou autonomy (Cou Culture and Arts Foundation, 2006). Currently, 10 Cou commissioners have contracts with the foundation and three of them are Shanmei residents (Interviewee CA010, 2005). Funds have come from several government organizations to carry out different projects, such as "The research project of the comprehensive planning of the Cou's Natural and Cultural Centre" commissioned by Alishan National Scenic Area Administration, the Tourism Bureau and the Ministry of Transportation and Communications (Interviewees CA009, CA010, A4, 2005). The Ministry of Education, the Council of Indigenous Peoples and Jiayi County Government also have subsidized the foundation to run the Cou Aboriginal Kuba Community University (Cou Culture and Arts Foundation, 2006). Courses includes hunting class, craft class, Cou clan literature and history class, plural cultural industry class, computer class, and traditional

dancing and music class. The majority of the lecturers are local Cou who are paid to teach (informal interviews 2004, 2005). Another project is “The Indigenous Traditional Territory Survey in Taiwan”. Each Cou village has one local Cou to carry out research in Cou villages, such as by interviewing local elders for the names of traditional places, their positions and stories, and conducting fieldwork. The wage is NT\$800 (CAD\$ 32)/day (Interviewee SB001, 2005).

Substitute Teaching

In recent years, the Ministry of Education has subsidized the cost of teaching personnel in all counties and cities in an attempt to solve the problem of insufficient manpower in public schools, to improve teaching quality and to encourage plural education. Several villagers are asked to teach their mother tongue (Cou language), arts, English and computer in public schools in the Alishan Area. The wage is calculated by the hour.

Street Peddlers

After Danayigu Ecological Park became well known, several individuals used the name and proximity of the park to sell roasted pork and sausage in nearby scenic spots and cities.

Migration

As indicated in Table 5-5, among the 467 villagers with in the labour force, 38.8% of them make a living outside the village (34.7% of them have cash earnings while the rest 4.1% do not have cash income). Most employment is in odd jobs and labouring work, followed by a small amount of business. A few are civil servants and commissioners for government organizations, artistic workers and teachers (Interviewees SA015, SA017, SA018, SC007, SC005, 2005; informal interviews, 2005).

Starting about five years ago, for the purpose of water and soil conservation in the mountain areas of the entire country, the Taiwan Forestry Bureau provided odd job opportunities in weeding and planting trees for afforestation. The bureau first delimited the working area and stipulated the deadlines for task completion. The wages were according to the number of working days. The work period was usually by the season and could be between one to six months. The Directorate General of Highways also provided casual labour, such as roadside weeding and highway maintenance. These projects were distributed across the entire island and were open for bidding. Foremen (who could be Shanmei or non-Shanmei residents) winning the bidding would contact Shanmei villagers and ask whether or not they

wanted to do the jobs. The period is usually one year and the number of weeding times is 8-12 per year. According to villagers' rough estimate, approximately 1/6 of villagers (n=80), usually adult men, moved out to do this kind of odd job (Interviewee SE002, 2004; informal interviews, 2004).

Many male residents migrated to cities for various labouring jobs in construction, such as making concrete forms, driving trucks, paving roads, building iron-covered houses and green houses. The disadvantage of migration is that less time is spent with family and relatives (informal interviews 2004, 2005).

Benefits

A regular cash income, particularly a wage, is likely to be sufficient to cover much of the cost of filling a food deficit, other cash needs and investing in production and/or saving as a reserve. If waged households can meet the first two needs, they are not under pressure to scrape together cash through sales of home-produced products, labour or assets. Nor need they rely just on subsistence resources. If they have enough to invest, they can purchase and cultivate popular cash crops with good market prices and increase the chance of obtaining more cash, especially when Alishan Farmer's Association promises that the products will be purchased with fixed prices and local residents do not need to find a market to sell the crops by themselves (informal interviews 2004, 2005).

5.7.3 Livelihood Activities Indirectly Related to Tourism

Wage employment (casual labour)

Maintaining and beautifying the environment

In the past three years, the Alishan National Scenic Area Administration, Alishan Township Administration, and the Council of Indigenous Peoples have provided short-term, supplementary employment opportunities in public services for the unemployed (informal interviews, 2004, 2005). The job quota was assigned to 14 villages (both Cou and Han people). Job holders work twenty-two days per month for six months and are then replaced by another group of applicants (Interviewees SA021, CA013, 2005; informal interviews, 2004). The tasks are to clean and beautify the environment, especially in scenic spots, and to cut the grass along No. 129 County Highway which connects Shanmei, Xinmei and Chashan. Recently, an interpretation program has been added and 6 villagers (including Shanmei,

Xinmei and Chashan) who registered as interpreters are paid by the County government. Since the other villages do not usually need interpreters, they are often assigned to work in Danayigu Park (Interviewees SA021, CA013, 2005).

Casual cash earnings

Artistic work and carpentry on a small scale

Individuals with artistic skills make cash in the following ways. They are subsidized by the government to teach villagers how to make a variety of handicrafts. At times, they take orders for the production of aboriginal dresses and the Cou's traditional daily tools, such as knives, mortar and pestel, and carrying baskets for use in performances and traditional ceremonies (Interviewee SA017, 2005; informal conversation, 2005). If large quantities of dresses are ordered, the tasks would be divided among women in the village who would all make extra income (informal conversation with women, 2005). Individuals are also paid to repair or build Cou traditional buildings, such as the millet goddess house and family ritual houses (Interviewees SA019, SA022, 2005). Small furniture items with Cou/aboriginal styles for use in cafés, eateries and handicraft stores, such as shelving, tables and chairs, are made by local villagers with carpentry skills.

5.7.4 Livelihood Activities in Tourism

Introduction

A substantial number of visitors have come to Shanmei in past years, as indicated in Table 5-6. Tourism-related businesses are growing in Shanmei, based on the Danayigu Ecological Park, Alishan Mountain scenery and festivals that relate to Cou culture. These businesses provide a wide range of earning opportunities for Shanmei, particularly since the park was established, although at present the potential is only just being explored and developed.

Table 5-6: Number of Visitors to Danayigu Ecological Park from 1998-2005

Year	No. of Visitors
1998	33,194
1999	68,894
2000	147,049
2001	187,953
2002	287,567
2003	213,785
2004	187,476
2005	178,627

From: Tourism Bureau (2006); Shanmei Community Development Association (1999-2000, 2001)

Opportunities to participate in tourism are distributed very unevenly across Shanmei. The main areas of concentration are in and around the park plus, to a lesser extent, along Jiayi Local Road 129. Within the community, those with strong financial capital and relevant skills, such as having a strong connection with outside groups and marketing abilities, will have more opportunities. Tourism-related livelihood activities are usually concentrated on weekends and holidays.

In terms of meeting basic needs, tourism is primarily for cash rather than subsistence. This is important because, in general, there are limited cash-earning opportunities in the mountains. The employment opportunities created directly and indirectly from Danayigu Park have had great effects on Shanmei villagers' livelihoods. Table 5-7 shows a variety of sources of tourism income.

Table 5-7: Sources of Tourism Income

Community Collective Income	Cleaning fee, parking fee, fish feed, soft drink and spring water, fishing fee, public phone, rent of Danayigu restaurant, vending machine.	
	Inside the park	Outside the park
	Wages from employment in the park (director, patrolling staff, gate keeper, plant tender, janitor, dancers)	Self-run enterprise, e.g. lodges, restaurants, homestays, campsites, cafés
	Semi-community-run enterprise: Danayigu restaurant	Wages from employment in lodges, restaurants and homestays
	Individual-run enterprise: restaurants, food stalls, handicraft stores	Sales of package tours and Cou life experience camp
	Self-employment, e.g., tour guides	Crafts sales to tourists
	Sales of local specialities to park visitors (e.g., seasonal agricultural products)	Leasing unused land to restaurant owners for food production (e.g. planting crops, raising livestock)
	Temporary employment for park-related construction and development	Leasing unused land for the operation of tourism enterprises
	Sales of cultivated Gu fish	Teaching craft DIY in studios
	Crafts sales to tourists	
	Leasing land to stall businesses and parking lots	

Note. Based on fieldwork conducted in 2004 and 2005.

Under and paid by Shanmei Community Development Association

Wage from employment in Shanmei Community Development Association (SCDA), Shanmei Community Share Cooperation (SCSC) and Danayigu Ecological Park

As Table illustrates, up to 13.1 % of Shanmei villagers with work ability are paid by Shanmei Community Development Association. The SCDA has eight paid positions, including the chair of the board of directors, the general executive, the secretary, the accountant, the cashier, a general assistant and two clerks. The personnel alter every two years in accordance with the re-election of the board of directors. Under SCDA, SCSC was established in December 2004 to take charge of affairs in the park (Shanmei Community Development Association 2005b). It began with 29 positions in Danayigu Ecological Park and has since expanded its personnel to 33 (Table 5-8). The average salary is approximately NT\$20,000 (CAD\$800)/month (informal conversation, 2004, 2005).

The 33 posts include the director of the park who is also the manager of SCSC, one public relations agent, three clerks, six patrol staff, one gate keeper/ticket seller, one plant tender/janitor, and 19 formal dancers. Except for the director, most jobs paid by SCDA are open to all Shanmei villagers and the period of each job is from one to two years, so that other villagers can take a turn (informal conversation, 2004, 2005). Positions are open to application and the board of directors and the park director decide who obtains the jobs. Wages are based on working hours/days, plus overtime pay and bonuses (informal conversation, 2004, 2005). If a worker cannot attend to his/her job, another person can fill in. During weekends, the increased number of visitors requires more casual labour, such as gate keepers or patrol staff who are also paid by the community association based on working hours (informal conversation, 2005). The park opens all year round from 8:00 a.m. to 5:00 p.m. The majority of the informal dancers are high school students who only perform in the park during weekends and holidays. All dancers are open to invitation for performance when time is available.

Patrol Staff

During weekdays, three patrol staff work from 7:00am to 7:00pm and the other three work from 7:00pm to 7:00am. During weekends, all six patrolling staff work from 7:00 am to 5:00 pm. Their tasks are to keep people from any kind of fishing, to safeguard visitors, and to maintain traffic order during the busy weekend and holiday periods (informal conversation, 2004, 2005).

Table 5-8: Personnel of Shanmei Community Share Cooperative and Employment in the Danayigu Ecological Park

Employment	n	Wage (per month) ^a	Period	Schedule
Manager of Shanmei Community Share Cooperation & Director of the park	1	NT\$ 20,000 (CAD\$ 800)	permanent	flexible
Public relations agent	1	Unknown	2 years	flexible
Clerks	3	NT\$ 18,000 (CAD\$ 750)	2 years	8am-5 pm
Patrolling staff	6	NT\$ 20,000 (CAD\$ 800)	1 year	Weekdays: 7am-7pm (3 staff) or 7pm-7am (3 staff) Weekend: 8am-5 pm (6 staff)
Gate keeper/ticket seller	1	NT\$ 20,000 (CAD\$ 800)	1 year	8am-5 pm
Plant tender/janitor	1	NT\$ 20,000 (CAD\$ 800)	1 year	8am-5 pm
Director of dancing league	1	NT\$ 35,000 (CAD\$ 1,400)	permanent	performance time ^c
Formal dancer & staff	19	NT\$ 800/day (about NT\$ 18,000/month (CAD\$ 720)) ^b	weekday	2 performances & sale of local specialties
Sub total	33			
Informal dancer	20	NT\$1,200 (CAD\$ 48)/day	weekend & holidays	up to 3 performances
Total	53			

Note. ^a Based on interviews conducted in 2004 and 2005 (the situation changes from time to time). ^b The wage of a full-time dancers depends on the number of days he/she performs. ^c Two performances on weekdays and three performances on weekends and holidays. One performance is about 40 minutes. Based on field work in 2004 and 2005

Dancers

Before 2005, dancers only performed on weekends (three performances) and were not obligated to attend each performance. They are usually engaged in other activities during weekdays, such as doing casual labour or engaging in agricultural production in the farming season. Because visitors who came during weekdays often complained that there was no performance and in order to increase tourism business, after the election of the board of directors in January 2005, the new board of directors of the community development association decided to have performances every day (two performances on weekdays and three daily performances on weekends) (Interviewees SA015, SD010, 2005; informal conversation, 2005).

In order to reduce the personnel costs of the dancing league, in 2005 the community development association applied to the Council of Labour Affairs Executive Yuan for a subsidy for formal dancers from the “Scheme in Plural Employment”. The offered quota for subsidy was for 15 people for the year of 2006. The program stipulates that the person who is

subsidized should work over 20 hours per week for a maximum of 22 days per month. The chair of the board of directors, therefore, stipulated that the working hours of formal dancers are from 8:00 am to 5:00 pm. Informal dancers (less than 20) who are not in the program do not have the restriction and mainly perform during weekends. All performers' costumes are made by the dancers themselves (Interviewees SA015, SA021, SD010, 2005).

Benefits

Formal dancers in the program now perform five days a week and obtain stable income. It is beneficial for mothers with young children (in public school) and teenagers, because two performances per day, one in mid-morning and the other in mid-afternoon, leave them time to take care of their children (Interviewee SD019, SD020, 2005). When there is no performance, some women make extra cash by producing handicrafts, selling agricultural products, or becoming waitresses when restaurants in the park are busy. Nonetheless, most dancers expressed that they do not like the arrangement. Families who mainly rely on the performance income are concerned that the board of the directors might exclude them because of a deficiency of community income or the subsidizing fund (Interviewees SD010, SA012, 2005). Others indicated that the schedule in the park is too long to allow them to be engaged in other activities outside the park and they cannot take a break freely (Interviewees SA015, SA016, 2005; informal conversation, 2005)

Performing part-time provides those studying and working outside of the village with great flexibility to make extra income and subsidize family expenses. The wage is NT\$1,200 (CAD\$ 40) per person per day. For high school students who attend schools in cities, performing on weekends offers them an opportunity to earn some cash, which partially fulfills the cash needs of several families, such as in paying tuition fees (Interviewee SA015, 2005). Such work offers a chance to earn cash when there are few casual labour during the non-farming season.

The positions in the parks are good for individuals who do not have the ability to find a better job, who are temporarily unemployed and who have small children and, therefore, need work close to home (Interviewees SC001, 2004; SD012, SD019, 2005). Wages of dance performers greatly helps some families with their cash needs, such as for school fees. A household with a member mainly relying on regular wage employment may have very limited labour for farming. If the household wants to continue with agricultural activities, it may need

to pay other villagers for help. The jobs in the park provide an option for those who are unable to engage in agricultural activity alone (Interviewee SD021, 2005).

Disadvantages

Staff under regular employment with more than nine working hours daily, such as patrol staff and ticket sellers, find difficulty in devoting themselves to farming activities. Their households usually pay for labour to do the farming instead (Interviewees SD003, SD005, SD021, 2005).

Under SCDA but not paid by it

Based on Table 5-5, up to 8.6% of Shanmei villagers with work ability benefit from the opportunities to gain wage and cash earnings inside Danayigu Ecological Park. Table 5-8 shows these opportunities.

Table 5-9: Sources of Tourism Income in the Danayigu Ecological Park

	<u>n</u>	N. of workers (owners + part-time)	Wage earned	Schedule
<i>Under SCDA, not paid by it, and inside the park</i>				
Tour guides/interpreters	6	N/A	NT\$1,000 (CAD\$ 40)/time	Based on reservation
Semi-community-run enterprise: Danayigu restaurant	1	4-10	Depends on working hours and work load	Based on reservation
Individual-run enterprise: restaurants, food stalls, and handicraft stores	13	13-30	Depends on working hours and work load	9 open on weekend 4 open every day
Cash earning (sale of Gu fish and local specialties,)	NA	Unknown		
Temporary employment for park-related construction and development	NA	Unknown		
Subtotal		More than 17-40		

Note. Based on interviews conducted in 2004 and 2005, the situation changes from time to time

Inside the park

Self-employment e.g. Tour Guides/interpreters

There are six trained tour guides/interpreters in Shanmei. Guide service can be reserved through the community association in advance and usually one guide is assigned for one tour bus (Interviewees SD004, SD006, 2004). Self-run lodges that run packaged tours also pay for interpretative service (Interviewees SA007, SC003, 2005). The community association usually pays for interpretive service for government officials. A guide can earn at least NT\$

1000 (CAD\$ 40) per trip and sometimes up to NT\$1500-2000 (CAD\$ 60-80) per trip (about 1-2 hours) (Interviewees SD004, SD006, 2004, 2005).

Semi-community-run Enterprise: Danayigu Restaurant

The right to operate the restaurant is open to all Shanmei villagers subject to an annual competitive bid. The household with the highest bid then has the right to run the restaurant, keeping the income generated in the year and paying the bid to the community association as collective profit. If the profit earned is not enough to pay for the bid, the association will consider the possibility of late payment, provide an extension, with no late fee or interest being charged (Interviewees SA007, SA013, 2005).

Costs

In order to obtain the operating right of the Danayigu restaurant, a household has to have enough cash (economic capital) to win the bid competition. Few households have such financial resources. Besides, a large amount of cash is needed to purchase facilities and equipment. Only well-off residents are able to afford such expenses (Interviewee SA013, 2005; informal conversation, 2004, 2005).

Benefits

1) *Cash earnings and provide another livelihood activity*

The household that runs the restaurant can make profit by serving up to 400 visitors per meal in Danayigu Ecological Park. The operators mainly rely on their relatives for regular help. However, when business is busy, they offer temporary employment for sometimes up to 10 servers. The wage is NT\$ 800-1500 (CAD\$ 32-60)/person (Interviewees SD015, 2005).

3) *Create cash earning opportunities, maintain raw material supply and stimulate crop production*

Several seasonal vegetables are produced in Shanmei. Some of them are abundant in supply, such as bamboo shoots, yams and taro, whereas others are not enough to meet the demand. For those short in supply, the owner contacts relatives and friends in other Cou villages and transports vegetables to Shanmei or orders them from outside (Interviewee SD015, 2005). Using locally produced crops maintains raw material supply, offers additional opportunities for cash earnings and indirectly stimulates crop production. Ingredients like river shrimp and fish are mainly purchased from outside (Interviewee SD015, 2005). Raw materials for general dishes with ordinary prices come mainly from outside where the cost of acquisition is

relatively low. Traditional Cou dishes, on the other hand, are more expensive because locally produced ingredients are used, such as Gu fish and free-range boars and chicken (Interviewee SD015, 2005).

The operator SD015 (2005) of the restaurant, who is also the cook at the time of the study, indicated that, if there is no pressure to pay the rent to the community and the restaurant is owned by her, she prefers to run the restaurant and her own homestay compared with the past way of making a living (i.e., farming). The latter is more physically demanding and the price of accommodation can be determined by oneself while prices of agricultural products have been low all the time. She also commented that typhoons and constant heavy rain in weekends greatly curtailed business in 2005.

Individually-run Enterprises: Restaurants, Food stalls, Handicraft Stores

According to the fieldwork conducted in 2004 and 2005, there were 13 individually-run restaurants and food stalls, and two handicraft stores in the park. The majority of them are only open during weekends while three eateries are open every day, serving both local residents and visitors. All owners of the restaurants and food stalls have cookery certifications that allow them to run the business. The restaurants sell a variety of Cou and general dishes (e.g., roasted mountain pork and sausages, river shrimps, rice cooked in bamboo, cooked rice, Gu fish, mountain bamboo shoots, vegetables and banana cakes). The food stalls sell small meals, snacks (e.g., dry sliced pork), drinks (e.g., jelly fig drink), deserts (e.g., pestled millet, ice cream, and popsicles) and processed local agricultural products (e.g., millet wine, flavoured bamboo shoots, bottled wasabi, fig seeds). A couple of villagers who own land in Danayigu make cash by leasing land to others to run a food stall (NT\$1500 (CAD\$ 60)/month) (Interviewee SD001, 2004).

Ingredients like vegetables are mainly produced in Shanmei, nearby Cou villages or purchased in towns. Sources of meat supply depend on the quantity of meat required and the prices of dishes (informal conversation, 2004, 2005). For example, chicks are purchased while they are young and villagers raise them in an organic way (i.e. free range and organic feed) so that the flavour of the meat is “mountain-like” (Interviewee SD009, 2005). Roasted pork is mainly purchased because the cost of raising pigs on a small scale is high and their odour is strong (informal conversation, 2005). As a result, only a few households raise them far from restaurants and household areas. River shrimps are mainly purchased from nearby

villagers. Millet is purchased from other towns but millet wine is produced locally. The restaurants and eateries inside and outside the park share many ingredients from the same sources (Interviewees SD002, SD008, SD009, SD011, 2005; informal conversation, 2005).

One handicraft store carries handicrafts and clothes from India, Nepal, Thailand, Hawaii and Bali with a small amount of locally-made handicrafts. The other carries at least 50% of locally-made crafts produced by community institutions and individual villagers (Interviewee SD014, 2005).

Benefits

1) Low cost and low labour demand

The investment in and regular cost of running a food stand in the park is small: one only needs to pay for electricity and the cost of ingredients. Employees in restaurants and food stalls who prepare food and serve tourists expressed that they like the jobs more than working in agricultural activities because they are less labour demanding.

2) Cash earning for self and others

Parts of the dishes sold in the restaurants use self and locally raised livestock and cultivated vegetables. This reduces costs and provides earning opportunities for villagers who plant crops and raise livestock.

3) Provide different livelihood options

These businesses provide additional livelihood activities to several families when farming alone cannot support them. An old couple, a disabled female and a middle-age woman with three children run three eateries that are open every day. They run long hours because they have very few other livelihood options (Interviewees SD008, SD009, SD011, 2005). A female owner of a restaurant and two female owners of food stands indicated that they like the jobs because they are interested in cooking and sharing Cou culture with tourists (Interviewees SD008, SD011, SD015, 2005).

4) Create a market to sell local products

The businesses provide a market to sell locally-produced agricultural products and mountain products, such as jelly figs, millet wine and mulberry wine.

Disadvantages

There is great similarity in the kinds of food sold (e.g. BBQ). In order to earn more business, one stall had unacceptably low prices and caused competition between restaurants. All stall-

keepers had a discussion and agreed to be consistent in pricing so that everyone could gain (informal conversation, 2004).

Sales of Local Specialities to Park Visitors

In 2005, the community was subsidized to build a pavilion in front of the performance hall. Souvenirs and local specialties are placed there collectively for sale (informal conversation, 2005). Different kinds of souvenirs related to Gu fish, Danayigu and the Cou tribe were designed and created through several community institutions, such as t-shirts, backpacks, hats, belts, necklaces and carving tools. Local specialties produced by local villagers, such as fresh and processed agricultural products, are also placed there for sale.

Other sources of park and tourism income

Temporary employment for park-related construction and development

In recent years, the success of Danayigu nature conservation and Shanmei community development has attracted a number of funding sources to improve the facilities and the environment within the park. These funded projects provide earning opportunities that include construction work (e.g. renovating the park gate and suspension bridge, developing hiking trails) and enhancing the Danayigu environment (e.g., weeding and planting certain flower species to attract butterflies). Such occasional work provides short-term wages.

Sales of Cultivated Fish

After the Gu fish of Shanmei became well-known, a few villagers reared fish for sale. The benefit is mainly cash income. Several years ago, under the Shanmei Community Development Association, Gu fish fry was provided to the Gu fish cultivation industry for NT\$10 (CAD\$ 0.4)/fish (M.-H. Wang, 2001). The income belongs to the association. A few individuals who own land in the park also built fishponds right beside the Danayigu River to produce more Gu fish. Two of them gave up Gu fish propagation after time because in the artificial habitat, Gu fish grow very slowly and consume a lot of food. They live better in the main stream and grow faster (Interviewees SA002, SA013, 2004). As a result, SA007 started to cultivate different species of fish, such as Tilapia, which is common in the cultivation fish industry.

Crafts Sales to Tourists

More than half of the crafts sold in Danayigu have been purchased from outside and have great similarity to crafts sold in other aboriginal areas and scenic spots. Recently, the government's subsidy for cultural businesses has facilitated the local production of handicrafts. Through various community institutions, more and more traditional handicrafts are being produced by the elders and modern handicrafts, mainly produced by women, are also sold in the park.

Leasing Land to Stall Business and for Parking Lots

Some individuals who own land inside the park earn cash by leasing the lands to stall businesses or obtain rent from the community development association because their personal land has been converted into public parking lots.

Not under SCDA and outside the park

As Table 5-5 illustrates, up to 16.9% of Shanmei villagers with work ability benefit from the opportunities to earn wage and cash incomes through tourism enterprise outside of Danayigu Ecological Park. Table 5-10 identifies these opportunities.

Table 5-10: Sources of Tourism Income Outside Danayigu Ecological Park

	<u>n</u>	N. of workers (owners + part-time)	Wage earned	Schedule
<i>Not under SCDA and outside the park</i>				
Self-run enterprises including lodges, restaurants, homestays, campsites, and cafés	9	23-38	Varies	Mostly weekend
Cash earning (making handicrafts, leasing land to tourism enterprises & community, teaching arts, singers)	NA	More than 20	Varies	Non-periodically
Total	29	More than 60-98		

Note. Based on interviews conducted in 2004 and 2005, the situation changes from time to time

Self-run enterprises, e.g. lodges, restaurants, homestays, campsite, cafés

Table 5-11 lists the lodges, restaurants, homestays and cafés that have been developed outside of the park, as well as their maximum capacities, numbers of staff, income sources and financial status.

Lodges and restaurants

At present, two lodges exist in Shanmei. One is called Shan-jy-mei and the other is called Yi-gu-ya-jwu. Five regular staff work for Shan-jy-mei villa and restaurant. Casual labour is also hired during busy times, mainly weekends and holidays. Such employees number as many as 30 people, including local residents and students who return to Shanmei at the weekend (Interviewees SA007, 2004; SD012, 2005). When there is no business, the staff is involved in cleaning, checking supplies, planting crops, raising livestock, harvesting mountain plants, the initial processing of bamboo shoots, etc. The majority of the ingredients for dishes provided at Shan-jy-mei restaurant and villa are local crops and livestock (Interviewee SD012, 2005).

Package tours arranged through the lodge include a variety of activities, such as hearing and watching traditional Cou songs and dances and visiting Cou traditional houses and hunting houses (Shan-jy-mei Villa, 2004). Trained interpreters in Shanmei can earn cash for providing interpretation services to package tours. To reduce the cost of food supply, the owner leases a piece of land from a villager to grow crops and for livestock raising. Surplus crops and livestock can be used to supply food stands and restaurants in the park.

Yi-gu-ya-jwu lodge is mainly run by 2-3 family members. They provide both individual meals and set meals. Ingredients, like vegetables, are mainly produced locally. Meat is mainly purchased in Jiayi City because they do not raise their own livestock. The owner indicated that the cost of chicken and pork in the mountains is two to three times more expensive than in the city, but when she can bear the price, she will buy locally produced meat to help other villagers.

Table 5-11: Accommodations, Café and Eateries in Shanmei

Accommodation	Max Cap.	Staff (No.)	Cash Income			Note
			Rooms & Meals	Services	Others	
Shan-jy-mei Villa (lodge & restaurant)	162	Family members & Shanmei residents (regular staff: 5; casual labour: depends on business)	45 rooms (\$ 1000-2000 ^c /room) ; 6 menus (general & traditional Cou dishes)	a) Package tours (3 meals included). b) Activities: catching shrimps, campfire party, jelly fig & bamboo rice DIY (do it yourself), Cou style of pestling rice, Cou dance teaching, firefly watching, interpretation. b) Karaoke & alcohol	a) Souvenirs (T-shirts, hats, handicrafts), self-processed agricultural products (e.g., bamboo shoot). b) Agricultural products of the farmer's association & others put up for sale	a) Has a large amount of loan (over NT\$ 10,000,000 (CAD\$ 400,000) b) Most ingredients of dishes are self supply c) Tour type: GIT ^a
Yi-gu-ya-jwu (lodge)	50	Family members (up to 5)	15 rooms (\$2000/room); Coffee, tea, simple meals, 2 menus (general & traditional Cou dishes)	a) Breakfast and snacks included. b) Activities: catching shrimps, Cou style of smashing rice, firefly watching	a) Handicrafts & agricultural products of others put up for sale	a)Has a large amount of loan b) Vegetable: local supply; meat, river shrimp and fish: outside supply c) Wooden house (high cost for construction and maintenance) d) Tour type: FIT ^b & GIT
Shiang-jwu-lin (homestay)	40	Family members	7 rooms (\$300/person, \$1200-2000/room); Tradition-al Cou dishes	a) Breakfast included b) Danayigu entrance fee discount c) Activities: night exploration, catching shrimps, BBQ, Cou style roasting sweet potato, Karaoke.		a) Has a large amount of loan b) Vegetable: local supply; meat, river shrimp and fish: outside supply c) Wooden house d) Tour type: FIT
Bayayi homestay	12	Family members	3 rooms (\$300/person, \$2000/room); Tradition-al Cou dishes	a) Breakfast included b) Activities: catching shrimps, butterfly & firefly watching		a) Wooden house b) Tour type: FIT

(Table continues)

Table 5-11: Accommodations, Café and Eateries in Shanmei (continued)

Café & Eatery	Staff (No. of people)	Cash Income		Note
		Meals	Others	
Yubas	Family members & close friends (up to 4)	Coffee, tea, simple meals	a) Fresh and processed agricultural products from local and the Farmer's Association. b) Handicrafts produced locally and purchased overseas.	Has a large amount of loan
Tso Tso Tsu	Close friends (up to 4)	Tea, simple meals		
Presbyterian Church homestay			For grouped visitors (\$200/person)	
Catholic Church homestay			For grouped visitors	

Note. ^a GIT refers to group inclusive tour. ^b FIT refers to full independent tour. ^c Currency rate: CAD\$1= NT\$25
Based on the field work conducted in 2004 and 2005

Benefits

1) Provide different livelihood options

Compared to casual labour, such as weeding and the wasabi plantation in the Mt. Alishan area, a two to three hour drive away, the jobs offered in lodges and restaurants, especially to regular staff, are less demanding with lots of down time (Interviewees SA013, SD012, 2004, 2005).

Such jobs are particularly helpful to single parent families with young children. Jobs located proximate to home make it easier to look after children. Even though the wage is less than can be earned in undertaking casual labour, it is better because the income is relatively stable and the parent does not have to migrate outside the village to do or find a job. When business is down and no income is paid, staff can take leftover food and “borrow” crops and livestock as subsistence food in advance by way of account keeping (Interviewee SD012, 2005).

2) Cash earning for self and others

The lodges and restaurants create a market for the sale of a variety of items, such as crops produced by themselves and by other villagers, either fresh or processed, as well as for local handicrafts which are sold to tourists directly (Interviewees SA007, 2004; SC003, 2005). If customers are interested in making handicrafts themselves, they will refer them to villagers with such skills (Interviewee SC003, 2005). During the bamboo shoot harvesting season, if

the business is busy, the staff usually asks relatives to carry out jobs and pays them later. This also creates another opportunity for cash earnings (Interviewee SD012, 2005).

3) Creating a market and enhancing skills

The business also provides many side jobs for local villagers to make cash. For both the owner and staff, the job enhances their restaurant management and administration skills through communication and interaction with customers (Interviewees SA007, 2004; SD012, 2005).

Disadvantages

A large amount of investment on the villa and restaurant has placed the owner and his family in long-term debt. The majority of the income is used to pay off the loan. Natural and man-made disasters have had a huge impact on the business. The disadvantage of having livelihoods mainly rely on tourism is demonstrated in case one (Interviewee SA007, 2004; SB001, 2005; informal conversation, 2004, 2005).

Case 1: Livelihoods mainly relying on tourism

SA007 is a 45-year-old male, the incumbent chair of the board of directors of Shanmei Community Development Association. His household used to make a living by producing tea and harvesting bamboo shoots. He has been elected as a people's representative several times and has developed strong relation assets and financial assets.

He served as the second chair of the board of directors in 1995 and was reappointed in 1997 until 1999 (when he resigned due to the use of community resources for his own tourism enterprises). In 1998, he built a self-run restaurant outside the Danayigu Park (the park began to charge in 1995). Later, he built another restaurant by the Alishan highway outside the village. He also purchased a piece of land in the park. Part of the land was converted to two fish pools to cultivate fish purchased from outside to supply his restaurant. A handicraft store was built beside the fish pools.

In 2003, through bidding, he obtained the operation right of the community-run restaurant in the park. He changed the name of the restaurant to Shan-jy-mei, which is the same as his own restaurant, to lead visitors to make the connection between Danayigu and his restaurant for future visitation. The business of his restaurant improved and he built a villa which can cater to 116 persons. The loan borrowed for all the investment was 10 million Taiwanese dollars (CAD\$ 400,000). To obtain the loan, he asked his two younger brothers and sisters who have a steady income to be his guarantors. One of his younger brothers used to make a living by producing tea and now runs one of the restaurants. The other is a policeman in Shanmei. One of his younger sisters is director of Shanmei public school and the other works for Chiayi government. Part of their salaries and income paid the loan every month for some years. Later on they decided that they could no longer pay. The three brothers decided to divide the property and draw clear lines of responsibility for debts. The handicraft store is dealt with by one brother and the restaurant beside the Alishan highway is managed by another brother. SA007 himself is responsible for the restaurant and villa outside the park. He did not obtain the operation right of the restaurant in Danayigu in 2005. At present, he has five regular staff and hires more casual labour during weekends and holidays. In 2005, he began to rent land from a villager for planting vegetables and raising livestock because he owed several pig sellers a large amount money and they started to demand that he repay his debts.

One of his younger sisters asked for a building right beside SA007's restaurant but she did not get it. She then leased a piece of land close to the restaurant from a villager with the intention of establishing a Cou cultural studio, selling aboriginal goods, coffee, and simple meals. It has not been making profits and now it has become an eatery, mainly serving locals.

(Case continues)

Case 1: Livelihoods mainly relying on tourism (*continued*)

Natural disasters such as typhoons and earthquakes are very common in Taiwan. Due to the accident of the Alishan train accident and SARS outbreak in 2003 and two big typhoons in 2004 which damaged the road to Shanmei and Chasan, the number of visitors dropped to only 1/5 of the regular amount in certain months in both years. Feng told me that due to the man-made and natural disasters, prearranged tours were all cancelled which had a huge impact on his business. He had to ask his friend in Taipei for help.

SA007 has possessed so much community resources and support from relatives. His family has greatly benefited from the Shanmei development. The tourism businesses of his family can be regarded as the largest in Shanmei. But is his livelihood secure?

Reasons:

1. Income generated from the tourism enterprises are used to pay interest on the loan.
2. Natural and man-made disasters caused a reduction of the number of visitors.
3. Being the chair of the board of the directors, the time invested in community affairs is more than in his business.
4. His tourism enterprises are unable to compete with those run by Han people along the Alishan Highway outside the village in terms of financial capital possessed, scale, facilities and accessibility.

His ability to keep good public relations with government officials and his enthusiastic participation in community building have become the main reason for government at all levels to offer construction funds to Shanmei.

From Interviewees SA007, SB001 (2005, 2005)

Homestays

At present, two households run homestays in Shanmei. One household has the majority of its land in Danayigu Ecological Park and lives right beside the park. They previously planted wasabi at high altitude on Ali Mountain for cash. It takes two to three hours to drive one-way from Shanmei to the wasabi field, which reduces time to spend with the family. After they expanded their home into a homestay and took on the running of the community-owned restaurant in Danayigu, work could be done at home and near home and their children could also be taken care of more easily (Interviewees SA013, SD015, 2004).

Benefits

Business is concentrated on weekends, so homestay owners can undertake other economic activities during weekdays. The prices charged for homestays are fixed, unlike the prices of agricultural products that fluctuate with market prices so that sometimes the income cannot even cover the costs. Homestays are multiple-purposes and can cater to tourists, friends and relatives.

Café and eatery

Two newly-opened cafés serve coffee, tea and simple meals to visitors and villagers and provide a variety of merchandises of indigenous people, such as handicrafts (made both locally and from outside, Cou and non-Cou) and CDs. One café provides part of its space for the display and sale of local agricultural products and handicrafts produced by other villagers. The setting provides an opportunity to earn cash for locals who have difficulty in gaining access to markets.

Campground with barbecue area

Bin Bin is the only campground and it was established along with the opening of Danayigu Ecological Park. It operates all-year-round but business is concentrated on weekends and during summer and winter vacations. Average earnings are NT\$10,000 (CAD\$500)/month. Fees charged include a camping fee (NT\$ 80 (CAD\$ 3.2)/adult and NT\$40 (CAD\$ 1.6)/child), parking fees (NT\$ 50 (CAD\$ 2)/car) and barbecue rentals (NT\$50 (CAD\$ 2)/time). Tent rental is NT\$ 200 (CAD\$ 8) per tent. Current capacity is 200 people. Services and activities, such as preparing firewood and the Cou style of pestling rice, can be requested for extra charges. The owner indicated that, later, he will leave the campground to his son to run (Interviewee SD004, 2004, 2005).

Benefits

Almost no funds were needed for investment. Most facilities in the campground are made of local materials. The campground is easy to maintain (compared to homestays) as it only needs to provide campers with the ground, electricity and water. Work can be done close to home and can be shared among household members. Income is immediate (Interviewee SD004, 2004, 2005).

Sales of package tours and the Cou life experience camp

SCDA and individuals who run lodges and homestays provided packaged tours of varying lengths (e.g. 2 days 1 night, 3 days 2 nights), content (e.g., fish watching tours, traditional Cou banquets, Cou dance performance, nature tours, Cou handicrafts DIY) and prices (e.g. NT\$1660 (CAD\$66.4)/person including accommodation, meals, guides and entrance fee) (Shan-jy-mei Villa, 2004; informal conversation, 2004, 2005)).

5.7.5 Summary of Livelihood Strategies

Most households combine several economic activities to support their livelihoods. Although several households rely mainly on tourism-related activities, more than one source of income is pursued to disperse the risk. Case 2 demonstrates the point. Virtually all households grow crops and raise chickens. A large majority of household relies on cash from casual labour to maintain their livelihoods. It is also clear that each activity provides not just one but a range of benefits.

Case 2: An example of the successful management of multiple tourism activities as livelihood sources

SA016 is a 49 year old man who runs a small restaurant in Danayigu Park with his wife. His two children have already graduated from school and found stable jobs. He used to make a living by harvesting bamboo shoots and planting crops for sale.

He has a good business head. In the First Gu Fish Festival, he saw a number of visitors in Shanmei and insufficient parking spaces. A resident had a car accident and needed cash urgently. SA016 bought a piece of land from him which was located right beside the park entrance for NT\$230,000 (CAD\$ 9,200). He asked his friends to help him to convert the land into a parking lot.

Gradually, in addition to the parking lot, he and his wife have constructed several buildings on this ground and began to run a restaurant. The rest of the buildings are rented to other villagers for a handicraft store and a food stall selling ice cream and beverages. Gaming machines were also set up for extra cash earnings.

Because his restaurant is located right beside the park entrance and the performing hall where visitors often congregate, his business is good. He did not have time to manage the newly-built parking lot, so he leased it to the community association. The community makes an average of NT\$ 1000,000 (CAD\$ 40,000) from the parking fees annually and pays him NT\$300,000 (CAD\$ 12,000) per year.

(Case continues)

Case 2: An example of the successful management of multiple tourism activities as livelihood sources (*continued*)

His wife and friends had input labour into the building constructions and some building materials were locally collected. As a result, costs were only about NT\$ 900,000 (CAD\$ 36,000) for building materials, kitchen facilities and equipment, and limited wages. He has a relatively stable income now and has almost paid off his loan. If not for the great earthquake in 1999 and the typhoons in following years that caused a reduction of the number of visitors, he would probably no longer be in debt.

His business is concentrated on weekends so, during weekdays, he can plant crops and harvest bamboo shoots during farming seasons. The crops can supply the restaurant.

He commented that he prefers doing business instead of being a farmer because the income generated from farming has not been able to cover the cost of the input and cash is not immediate. On the other hand, running the business can see cash immediately. However, even though market prices of agricultural products are low now, he would not give up agriculture because it would be regrettable to have farm land goes desolated. Besides, his restaurant needs the crops.

His livelihoods consist of multiple tourism- related activities, and one cannot survive on these only. He used farming to support his business. His business has helped his relatives and friends by providing a part-time wage earning opportunity and adding value to locally-grown crops by purchasing them.

From Interviewees SA016, SB001 (2005)

5.8 Benefits and Costs of Conservancy Formation and Tourism

Enterprises

Through the operation of Danayigu Ecological Park and Shanmei Community Development Association, different assets, tangible and intangible, have been accumulated and depleted on individual, household, and community scales. New livelihood resources have been created through environmental, economic, social, and cultural changes. The following section discusses the issues in detail.

5.8.1 More Secure Livelihoods

The main benefits and needs met are

Cash needs

All Shanmei households need cash in order to pay for food, school fees, clothes, transport and agricultural inputs. However, only a minority have regular wage jobs. For meeting cash needs, the majority have to rely on pensions, casual labour (such as weeding, tending crops and construction) and sale of home-produced products (vegetables, processed millet, wine). For those without regular jobs, these options can be critical to making ends meet, but they are generally constrained by low market prices and a limited market. As Shanmei Cou rely more and more on cash and with few job opportunities in the mountains, tourism has expanded cash-earning opportunities. These can be divided into the following four different types:

- 1) *Individual income* from operating tourism businesses (e.g., owners of lodges and restaurants).
- 2) *Wage* from full-time employment: e.g., employees in the community development association and park.
- 3) *Occasional earnings* from sales of products and labour: e.g., making crafts, guiding and selling local specialties. Sellers of home-produced/gathered products and casual labourers can earn more from expansion of markets (selling crafts and local specialties to tourists), development of new products (e.g. processed bamboo shoots), maintenance of raw material supplies (e.g., bamboo for weaving) and increased demand for casual labour (e.g. from restaurants and lodges). This type of income is particularly helpful to women and households with many young children.
- 4) *Collective income* earned by the Shanmei Community Development Association. All members of the community can share in the benefits gained from tourism by a variety of institutions and programs.

Intangible assets

5.8.2 Support to Multiple Livelihood Strategies

In order to diversify risk and gather together sufficient income, virtually all rural households have to combine multiple livelihood activities, using different resources and skills at different times. Therefore, the impacts of any new economic activity on other activities are critical.

Conflicts between tourism-related economic activities and other activities may not be obvious in terms of the use of land, water and time.

Fitting into current livelihood styles

Many tourism-related activities occur by way of casual labour and are concentrated during weekends and, thus, can fit into most villagers' odd-job dominated livelihoods.

Providing other livelihood options

In times of economic depression, the market prices of agricultural products are low. Besides, there are few job opportunities in the mountains. Tourism-related activities have provided up to one third (29.8%) of Shanmei villagers with work ability to earn cash periodically. Full-time positions occupy 8.8% (n=41) of the proportion while part-time positions occupy 4.3% (n=20). They are paid by Shanmei Community Development Association. The rest of the proportion (16.9%; n=78) is self-run enterprises and self-employed positions.

Maintaining farming and harvesting

Livelihood activities in Shanmei have evolved from traditional hunting, farming, gathering and fishing to the current situation where casual labour are supplemented by the traditional livelihood activities. Tourism enterprises stimulate production of agricultural products. As noted above, crop planting and livestock raising are maintained on a small scale to supply to restaurants and food stalls. For example, to reduce costs, the owner of Shan-jy-mei Restaurant and Villa, whose business is on a larger scale than most, rents other villagers' land to produce crops and raise livestock. Thus, a small porportion of the uncultivated farmland is used again but the ideal of having tourism drive the development of agriculture has not been actualized.

Several farmers in Shanmei emphasized that tourism is easier to integrate into current livelihoods than other types of employment, such as migration, construction work outside the village and casual labour along the Alishan Highway, because the tourism jobs are near home and they can keep an eye on their land and their children.

Providing several small markets to sell local products

One main reason that the Shanmei Cou hesitate to engage in farming is due to the lack of marketing channels in the mountains. The prices offered by middlemen are often much lower than market prices. Small markets created by tourism enterprises provide better prices for agricultural products that can be sold on the spot, save transportation costs and reduce the likelihood of producers being exploited.

Facilitating women conducting domestic work

Tourism activities near home are especially beneficial to women who have young children and senior people at home, because work proximity makes it more convenient to look after them.

A foundation for development

After Danayigu Ecological Park became well known, the government provided more and more funds to improve infrastructure, such as roads. New economic activities were also created, such as restaurants, lodge, cafés and studios. Skills gained through community institutions will increase households' productive capacities and resilience. For example, a few female villagers indicated that the knowledge of flora and fauna gained in the interpretive classes has helped in the planning of the environment surrounding their homestays, making them more attractive and providing a resource with which to educate visitors.

More diverse, secure livelihoods

Diversification of risk and flexibility are absolutely essential for rural households, given the unpredictability of natural disasters, fluctuation of market prices and lack of industry in rural areas. The importance of tourism enterprises to Shanmei household security is obvious in that it provides new opportunities for *livelihood diversification*: it provides new sources of income and investment and can support households in their pursuit of multiple activities. In particular, it provides opportunities for different types of households, not only those in a good position to secure full-time jobs but also *women, the disabled and seniors*.

Finally, changes in community capacity for taking collective decisions, managing common property resources and dealing with outsiders are critical to boosting the livelihood security of community members. More broadly, enhanced community capacity to deal with a number of development challenges and to promote collective interests can have deep impacts on rural livelihoods. This will be described in the following section.

5.8.3 Community Empowerment

Institutional development and adaptation

Community-based organizations are means by which groups of rural residents can collectively identify and pursue their interests. Institutional development is therefore a pre-requisite for common property resources management and for bottom-up development. Even though the Shanmei community development association shows a relatively independent institutional base in the Cou tribal area, it is based on local government structures along with erosion of traditional authority. Also, it lacks experience in activities that combine commercial and natural resource management. On the one hand, Shanmei Cou expressed the need to have external professional knowledge and sources of inputs to manage the park effectively, run tourism enterprises successfully and enrich tourism content in order to improve the quality of local life. On the other hand, they are concerned that too much external involvement would result in the loss of their leading position. When the community development association unselectively applies for subsidies offered by various program, because a clear development goal has yet to be determined in the community, the sovereignty of the village might be lost (Interviewee SB001, 2004).

Nonetheless, the association has progressed because it appears to be able to develop institutions appropriate to the task at hand and to adapt and develop them to meet new challenges or overcome problems. For example, during the period of the Shanmei Tourism Promotion Committee (1987-1989), the purpose of pushing conservation tasks in Danayigu was to further establishing the tourism industry in Shanmei. However, with respect to seeking to make a profit, because the committee was an informal registered organization, it lacked a legal basis for charging a clean fee. Meanwhile, an official document on “Integrated Community Building” was released by the Council for Cultural Affairs. To be in tune with this opportunity, a villager assembly was held in 1994 and the decision was made to establish the Shanmei Community Development Association (SCDA) and put Shanmei Tourism Committee (1989-1994) under the association. Such an arrangement enabled Danayigu to become legal and enabled Shanmei to truly own Danayigu (Li and Tang, 1999).

Community identity and social cohesion

In the absence of a clear identity, collective action for a common purpose is constrained. Tourism development, even at an early stage, has enhanced community identity and social cohesion by:

1. Providing opportunities for residents to identify a *common purpose* and to strive collectively to realise it (e.g., establishing a conservation area, expanding tourism).
2. Creating new ways to participate in community life (e.g., attending meetings, taking up positions on a committee or project team).

However, as Shanmei began to taste the fruit of success, certain individuals who had not participated in the early arduous stages started to strive for benefits in many different ways. The following two issues relate to the undermining of social cohesion in Shanmei.

Community resources are controlled by small number of people

Sixteen community cadre decided how community resources and collective income should be used. For example, the incumbent chair of the board of the directors has been appointed three times due to his ability to keep good relations with government officials. He has used community resources to establish two restaurants, one villa and one handicraft store in the park. At present, one of his sisters and his daughter are the staff of the community development association. Some villagers stated jokingly that at present, Shanmei development is a family industry. As a community cadre, he is expected to provide guidance to the villagers on how to develop and manage tourism business, and especially to share his experience on how to run a restaurant since he has run two restaurants for several years. However, when other villagers are engaged in the same businesses (i.e., running a restaurant), the relation between him and other villagers become competitive and the community resources under his control become an advantage for him to compete with other villagers (Interviewee SA016, 2005; informal conversation, 2005). Also, tourism enterprises have been mainly concentrated in the park and the surrounding area and they have not been expanded to the other neighbourhoods. The situation has gradually eroded community cohesion. As a number of villagers have not greatly benefited from tourism and cannot relate themselves to the success of Danayigu Park, they will not continue the conservation of Gu fish and other wildlife. Some villagers still use electrocution and poison to catch fish in other tributaries of Tzengwen River and upper and lower reaches of the Danayigu River. Fish can only be seen in

fish watching areas in the park. The previous chair of the board of the directors SA003 (2004) indicated that after Shanmei had received great recognition from the government, outsiders did not dare to catch fish in the river. The setting of patrol staff is mainly to control local villagers. Even so, the director and the staff sometimes ignore the undesirable behaviours. A mechanism for prohibiting the poisoning and electrocution of fish has never been completely set up in the village (Interviewee SA012, 2004).

The lack of consensus on tourism development

Since the system of board of directors was established, rival factions have risen, especially with respects on how to use and distribute the revenue generated from tourism. Such factions often inhibit the implementation of plans that have been decided upon, such as establishment of a wildlife zone in the park and constructing hiking trails to enrich the tourism activities in Shanmei (Interviewees SB001, SC003, SC004, 2004; 2005).

Women: participation and power

As in many societies, traditional Cou women carry much of responsibility for family welfare but are excluded from community decisions. In the past several years, the number of female directors has increased, showing that women are increasingly involved in community-level decision making. As the number of women holding leadership positions increases, the risk of women's priorities being excluded diminishes. Also, as more and more young females have returned to the community on completion of their education in cities and have become involved in community development affairs, almost all office work is conducted by women. Although women are not fully represented in all decisions, they are responsible for carrying out decisions made in the meetings through various institutions. On the surface, Shanmei appears to be a community led by men but, in fact, women are a powerful force in community development.

People: skills and confidence

A large number of residents have gained skills according to the nature of their involvement in community development activities, as members and staff of the community development association and various community institutions, and as owners and employees of tourism enterprises. They are constantly gaining knowledge and skills through exposure to new

activities and approaches, supplemented by organized workshops and courses, and exchange visits. The wide array of skills includes:

- Natural resources management skills, such as park zoning and the propagation of Gu fish.
- Organizational skills, such as planning, record-keeping, staff management and monitoring.
- Leadership skills: building consensus, holding and chairing meetings, mobilizing people and organizing events.
- Enterprise skills, such as marketing, accounting, craft production and sale, negotiation, serving tourists, interacting with bus drivers to increase business and increased service quality.
- Communication skills, such as making presentations, writing reports and interpretation.
- Technical skills: budgeting, dealing with both central and local governments, and dealing with lawyers and legal requirements.

New skills are being developed. This is not only useful for the individuals but also enhances the community's human resources base and their collective ability to cope with change and take initiatives. Moreover, they are in a better position to use the government's current policies for tourism development in aboriginal areas to expand the Cou tribe's economic development.

Natural resource management: taking responsibility and control

Activities within Shanmei Community Development Association include the conservation and revival of the river, the management of river resources and the formation of Danayigu Ecological Park. The community has increasingly engaged in broader common property resource management and land-use planning; thereby, strengthening their control over their environment and future. This shift is partly because decisions about wildlife habitat, tourism development and all aspects of a park management plan cannot be made in isolation from decisions about other land uses. Conservation and development force the community to assess trade-offs between the costs and benefits of various land uses. For example, to demarcate the park area, some private lands have been switched to public use, such as for trails, roads and the museum of cultural and historical relics. The expansion from Gu fish management to

common property resource management illustrates that the institutional development that has occurred has enhanced community management capacities. Although the park does not have legal rights over land or non-wildlife resources, their new skills, combined with legitimacy in the eyes of Shanmei villagers, the Cou tribe, and even the mainstream society, give them more power to negotiate and implement collective management practices.

Strength in dealing with outsiders

Shanmei has been proactive in voicing their demands to others. This can be attributed to two impacts of the community development association: firstly, their strong internal organisation which enhances the confidence that they possess and the respect they are given. Secondly, they have gained substantial experience in dealing with outsiders through the association, such as in meetings with government officials, advice from social, legal, environmental and economic advisors, negotiations with the private sector, exchange visits to and from other regions and participation in national workshops. Enhanced capacity to request assistance or object to a decision is evident and the community has been proactive in dealing with outsiders and achieving success in getting their needs met. Box 2 illustrates the point. One good example is that after the success of the conservation and revival of the Danayigu River and the formation of the park, in order to provide a legal basis for Shanmei Cou to charge a fishing fee, the Alishan Township Assembly passed “Policies for Brook Biology Protected Areas Governed within Alishan Township” in July 1996 by quoting Article 20 of the Wildlife Conservation Law, Article 44 of the Fishing Law, and the Law on Civic Organizations. The measures have authorized the villages or communities in Alishan Township to implement brook conservation and fishing management. The Jiayi County government in July 1999, declared it illegal under Article 44 Item 4 of the Fishing Law to fish or take plants in Danayigu; thus, giving the prohibition on fishing there a legal basis (C.-R. Li, 2000).

Box 2: Community strength vis-a-vis outsiders

Alishan National Scenic Area Administration was established in 2001. Coveting the profits generated from the Danayigu Ecological Park, the administration consulted with the Shanmei Community Development Association. Senior officials had the intention of either taking over the management right or developing a co-management mechanism for the park in order to count Shanmei as one of its administrative achievements. The association firmly rejected the proposal. After meeting with a rebuff, the administration began to think through the kinds of communication and management strategies that might be used to improve the relations with the seven local Cou villages. The director initiated the idea of establishing the Alishan Cou Tribe Cultural and Tourism Development Resources Committee. As he claimed, all tourism activities, including the building of facilities and the holding of activities in Cou villages in Alishan, must receive this committee's approval. He noted proudly that this is the first such committee in Taiwan and it is made up of tribal elders and community leaders. Even though some villagers in Shanmei had earlier indicated that it was unwise to adopt a tough manner towards the administration and pointed out the necessity of maintaining harmonious relationships with the administration because it is the highest government organization in charge of tourism development in Alishan area and holds massive resources and funds, this is an instance in which Shanmei villagers have successfully safeguarded the community economy and received respect from a national government organization that was misusing its power (interviews, 2004).

Pride and dignity

Pride at the community's control over decisions is enhanced by the recognition that the community has gained from outside authorities. The park has received a number of awards which bring public recognition and visits from other regions, researchers, NGOs, local and central government organizations, and even the president. The significance of recognition and decision-making power to a rural community is all the greater given their historic and geographical marginal context. Political attention has been generally biased towards Han populations and urban areas (where economic development is faster and the majority of the population live). Aboriginal peoples in remote areas have felt socially, politically, economically and geographically marginalised.

Pride at Cou traditional culture is enhanced by providing interpretation, especially to school groups and government officials, and the course on the revival and conservation of the river, as well as its apparent success. Through deeper understanding, respect is shown by visitors.

In summary, Shanmei Community Development Association has formed institutions with grassroots legitimacy and capacity for engaging in a range of development activities and pursuing community objectives. The more assets that they have (as described above), the more that they are able to manage common property resources and to formulate and pursue their common interests, and to take control of development processes.

5.8.4 Culture Benefits

Shanmei has gained cultural benefits from the establishment of the Danayigu Park as Gu fish have returned and parts of local traditions have been revitalized. These successes are particularly significant to older villagers.

Cultural value of Gu fish

Gu fish have a cultural value. Therefore, restoration of their population is seen as a benefit, irrespective of their use. Many Cou villages have made attempts to restore their rivers but have failed because they cannot reach consensus in the villages. Many old villagers expressed that they would feel strange if there were no fish in the river. This cultural benefit was one of the major ‘intrinsic incentives’ that drove the support of many villagers for several years before economic returns became an additional benefit. Even so, at present, certain villagers still use nets, electrocution and poison to catch fish for livelihood purposes.

Strengthening traditional skills and cultural practices

Community institutions have revitalized some traditional practices, have provided young to middle aged villagers with opportunities to understand their roots and have motivated the younger generation to study aspects of their own culture, such as craft-making, dancing, Cou history and culture, for purposes of interpretation. As such practices gain recognition from outsiders (tourists) and economic value, this can increase interest among the younger generation and enhance community pride in their culture and traditions. Stimulation of interest in cultural events and recreational activities is evident in Shanmei. For example, the Gu Fish Festival has occurred every year for the past 10 years, organized by Shanmei Community Development Association. Thousands of people attend each year and games of pestle sticky rice, Cou archery and jelly fig DIY highlight traditional skills.

CHAPTER 6

LIVELIHOOD STRATEGIES AND CHANGE BEFORE AND AFTER TOURISM DEVELOPMENT IN CHASHAN VILLAGE

6.1 Introduction

Chashan serves as the second case study to explore the evolution of livelihood strategies. It is a second investigation of the adaptation of Cou society to internal and external pressures and of their future goals and aspirations. Such information is also essential for the identification of possible factors related to the introduction of tourism. This chapter illustrates the changes of livelihoods before and after the initiation of tourism to examine how residents perceive the consequences of tourism. The analysis is guided by the sustainable rural livelihood framework. Similar to the preceding chapters, this chapter starts with the overview of Chashan, including its physical and human environments which provide a context for the understanding of local livelihood pursuits. This is followed by a detailed description of the process of tourism development and corresponding organizations and institutions for its management. The data illustrate the multiple purposes of tourism development and the essential components that are necessary to make the initiative successful. An overview of current livelihoods is used to demonstrate how and in what forms tourism has been incorporated into present livelihood strategies.

6.2 Geographical Environment

Chashan village is located at the south end of Alishan Township. The annual average temperature is 22.3°C with highest mean monthly temperature in July (25.95°C) and the lowest in January (17.05°C). The annual rainfall is 2,282 mm (China Rural Village Development and Planning Association, 1998). The rainy season is from May to August while the dry season is from November to February (M.-W. Wang, 1990). The altitude of Chashan increases from 237 meters along the Tzengguen River on the east side to 1733 meters on the west. The total area of Chashan is about 2500 hectares, including 700 ha. of state-own forest land (28%), 930 ha. of reserved land for indigenous people (37.2%), and 870 ha. of land for other uses (34.8%). Within the reserved land for indigenous people, 85.6% of the land is

Table 6-1: Socio-demographic Characteristics of Chashan Residents

<u>Sex</u>	<u>n</u>	<u>%</u>		<u>Education level</u>	<u>n</u>	<u>%</u>
Male	268	54.6		Primary school & under	130	26.4
Female ^b	223	45.4		Junior high school	74	15.0
<u>Age</u>				Senior & vocational school	52	10.5
Under 6	47	9.6		College and university	23	4.7
6-12	48	9.8		Graduate school	0	0
13-18	40	8.1		Unknown ^c	212	43.2
18-24	56	11.4				
25-34	90	18.3				
35-44	77	15.7				
45-54	61	12.4				
Over 55	71	14.5				
Unknown	1	0.2				
Total	491 ^a	100.0		Total	491	100.0

Note. ^a The number includes those whose household registration is not in Chashan to obtain the numbers of people who migrated out of the village for study and work. ^b Females who are married with household registration out of Chashan are excluded. ^c The above references only provide partial residents' education level. From: "Basic survey of socio-demographic characteristics of Chashan residents" by Cou Culture and Arts Foundation (2005, May); "Alishan population register over the age of 12" by Alishan Household Administration, Jiayi County (2006, April); "Socio-demographic characteristics of Chashan residents" by Health Center of Alishan Township of Jiayi County (2005, December). "The Handbook of the Fourth Annual General Assembly of Chashan Community Development Association of Alishan Township in Jiayi County : The Minutes of the Meeting" by Chashan Community Development Association (2005, May)

The structure of the local government in the village and the village office and its business responsibilities are the same as in Shanmei. Chashan Community Development Association (CCDA) and Chashan Leisure Agricultural Area Development Association (CLAADA) are responsible for almost all village decisions, preparing village-level development plans and their implementation. The three organizations have different leaderships and are supported by different government organizations. Lack of communication and co-operation between the organizations has inhibited planning and implementation of community affairs. This problem and the organizational structure and patterns of decision making of CCDA and CLAADA will be discussed in detail later.

6.3.2 Initial Settlement of the Village

The original name of Chashan was *cayamavana*, meaning "plain on the hill-side". There was no inhabitant at Chashan village from 1762 to 1940. The legend has it that a very long time ago, ethnic Dagubuyan (an ethnic Cou surname) people lived here. They later suddenly

disappeared for unknown reasons. This place was called by them “Cayamavana” in the Cou language, meaning “plain in the mountainside” (CA001, personal communication, November 9, 2004).

Then came the Japanese, who took this place as a pasture. They disliked the lengthy name and renamed it “Cayama”. Later the Chinese Nationalist government came to Taiwan and called it Chashan, meaning “Tea Mountain”, because it sounded the same as “Cayama” in Japanese (CA001, personal communication, November 9, 2004).

Chashan is a relatively young indigenous village. At the end of the Japanese colonial period (1950s), the first Alishan Township mayor, who was Cou, encouraged Cou people from Lijia, Dabang, and Leye to migrate to Chashan to ease their increasing population and the promise of cultivable land.

6.3.3 Contemporary Social and Biophysical Environment

Village infrastructure includes a village administrative office, one police station, one clinic, three churches (i.e., Presbyterian and two True Jesus), and one elementary school with a nursery. The churches are another important community organizations which has influenced the construction of new social relations¹. The Presbyterian Church was established in 1953, followed by two True Jesus Churches in 1973 (S.-S. Wang, 2003). Similar to Shanmei, the organization of the Presbyterian Church is comparatively de-centralized. Because the church has local clergy (from the Cou village Laiji) and has participated in local affairs for a long time, Presbyterianism has had a strong influence on the course of Chashan’s development. The True Jesus Church is relatively de-centralized in organization, but mostly missionaries are assigned to local branches from the main office. A well-paved local road, Route 129, connects nearby Cou villages, Xinmei and Shanmei, and provides access to Jiayi City. A broad provincial Highway 3 also provides another route to Jiayi City. Public transportation is not available.

¹ Please refer to footnote in Section 5.3.3 for the description of Cou traditional religion and the conflict caused by the introduction of Presbyterianism. Chashan is *lenohiu* (small society or branch-village). As a result, no traditional rituals are hold in the village. Also, the village does not have shanman.

As Shanmei, several national welfare programs for aboriginal people exist (Table 6-2). In addition to the national welfare program, Jiayi County and Alishan Township also provide several welfare programs to aboriginal households with a single parent and low incomes.

Table 6-2: Subsidy program of the Council of Indigenous Peoples to Different Age Groups of Aboriginal People

Age	Amount of subsidy/term/person	Note
3-6 (pre-school)	NT\$6,000 (CAD\$240)	Granted
6-15 (public to middle school)	NT\$2,500 (CAD\$100)	Granted
15-18 (high school)	NT\$4,800 (CAD\$192)	Granted
Over 18 (college)	NT\$20,000 (CAD\$800)	Limited number
Over 18 (college) – low income family	NT\$15,000 (CAD\$600)	Granted to all applicants
Scholarships and bursary	NT\$25,000 (CAD\$1000)	¼ of the aboriginal students can be subsidized
Over 55	NT\$3,000 (CAD\$120)	Granted
Over 65	NT\$4,000 (CAD\$160)	Issue to low income family

From Jan & Yang (2002); interviews (2004; 2005)

A saving cooperation society was recently established to help villagers to form saving habits and to teach them about investment, insurance and money management. A light truck carrying meats, vegetables and fruits from Jiayi, stops in Shanmei and Xinmei and ends up in Chashan every day. Young females under age 40 greatly rely on the trucked supplies to prepare three meals each day for their families. The truck also takes order from villagers who run food stalls and eateries for certain ingredients not produced in Chashan.

6.4 Contemporary Livelihood Pathways

Chashan originally belonged to the village of Xinmei. The first Alishan Township mayor, who was Cou, developed “The First Farm” in Xinmei and “The Second Farm” in Chashan about 50 years ago. Cou inhabitants developed some paddy fields and depended on agriculture for their livelihoods. Han people arrived here later and planted giant bamboos. During the immigration, the Cou and Han were in close contact and imitated each other’s culture and living styles, decreasing cultural differences (Interviewee CA002, 2004).

The Cou also started to plant giant bamboo. Later, both the Cou and Han depended on afforestation with a large number of fir trees for the lumber industry, because lumber was one of the major building materials for houses two to three decades ago. Then, a variety of building materials, such as cement, bricks, asbestos shingles and iron sheeting became

available and replaced lumber which easily catches fire. The use of lumber has been decreasing and is now used only for decorating houses and concrete forms. The products of the petrochemical industry have gradually displaced those of the lumber industry. With a low demand for lumber, the price of lumber also decreased. Planting trees could not support a whole family, especially because it takes at least 15 to 20 years for the trees to grow and, until then, how is the family going to survive? Therefore, after felling firs, people barely reforested and started to plant taros and ginger (Interviewee CA002, 2004).

Other industries were promoted by the Indigenous Peoples Council, such as planting the tung oil tree (*Aluertes fordii Hemsii*), falcate-leaved albizia (*Albizia falcataria*), and oiltea camellia (*Camellia oleifera*). The seeds of the tung oil tree can be used as a lubricant for machines but, as happened in the lumber industry, it was displaced by petrochemical products. The timber of tung oil trees was used to plant edible fungus (*Auricularia auricular*). Edible fungus can be planted in holes in wood from a tung oil tree. The edible fungus can grow very well but it can be harvested only once; therefore, it was not well promoted (Interviewee CA002, 2004).

Falcate-leaved albizia is a kind of tree exhibiting low density that grows fast. It is difficult to grow to maturity because its stem is easily broken by wind and it is not suitable for use for building. It was used to make lunch boxes and matches. However, lighters replaced matches, and steel and plastic boxes replaced lunch boxes made of falcate-leaved albizia. The government contracted with the people who planted falcate-leaved albizia and guaranteed them that the products would be purchased at a fixed price. Nonetheless, after those factories were closed, the government did not purchase unused equipment and let it sit. After promoting the planting of falcate-leaved albizia, the government gave up too (Interviewee CA002, 2004).

Later, with government promotion, most Chashan inhabitants planted a large number of plums which were used for preserved fruits. However, after a while, they found that the income could not even cover the labour cost. Factories collected plums one year but not the next so people cut the plum trees or left the fields untended (Interviewee CA002, 2004).

During the 1970s, because Taiwan overproduced paddy rice, the government encouraged growers of paddy fields to plant corn as feed in 1984. The Provincial Farmers' Association agreed that it would buy corn at a fixed price and provide subsidies. At that time,

some inhabitants' standard of living actually improved. After a while, the policy of planting rice changed to planting feed (*dawtyan zhuantzuoh*) and when that stopped, there were many desolate fields in Chashan (Interviewee CA002, 2004).

Three to five years ago, it was popular to grow taros but their cultivation was not promoted by the government. At that time, the Farmers' Association encouraged Chashan residents to establish "classes of industrial production and marketing". These kinds of classes provided people with some professional assistance and subsidies. There was a "Taro Production and Marketing Class" in Chashan but it disappeared after a while. Because a lot of taros were produced in Taiwan, the price decreased. Besides, after the first harvest of taros, noxious insects were found in the soil and the land could not be used to grow taros again (Interviewee CA002, 2004).

During the 1980s, World Vision assisted Chashan with the planting of oiltea camellia trees. The class of Camellia Oil Production and Marketing was established in 1986 and ran until 1991. It was re-established in 1996. In 2000, Chashan even won the gold medal of the Food Appraisal Association and, at that time, the class was famous (Interviewee CA002, 2004). However, villagers had a number of challenges in developing the camellia oil production industry. In addition to external risks such as typhoons and rodent damage, the quantity of production was too low to cover the cost of labour. Oiltea camellia seeds are only harvested once per year. It takes time and labour to harvest (hand-pick), expose the seeds with the shell to the sun, shell, expose unshelled seeds to the sun, transport seeds to the lowland to extract oil, bottle, and maintain processing facilities. Besides, sales channels for agricultural products are limited. It is easy to find a market for selling camellia oil in cities with their huge populations but not in distant mountain areas (Interviewees CA002, CE002, 2004). In addition, some dishonest merchants imported oiltea camellia seeds from mainland China at a cheaper price and this affected the selling of Taiwan local oiltea camellia seeds. A bottle of camellia oil extracted from oiltea camellia seeds imported from Mainland China costs around NT\$200 (about CAD\$8), but a bottle of camellia oil extracted from oiltea camellia seeds grown in Taiwan costs around NT\$500 (about CAD\$20) (Interviewee CA002, 2004). Even though the quality of the former is less, consumers' often do not know the difference. The dishonest merchants also include the Alishan Township Farmers' Association. The Association belongs to the farmers of Alishan and is supposed to assist the farmers but

the association imported and sold camellia oil, and tried to compete with the local farmers. As a result, the camellia-oil producers who used oiltea camellia seeds grown in Taiwan have found it difficult to make a living (Interviewee CA002, 2004). They do not have enough funds to hire labour, do not have time to wait for the bottles to be sold because they usually need cash urgently, and they are unable to compete with the outside products with lower prices (Interviewee CE002, 2005). Now, many producers only sell oiltea camellia seeds right after they gather them for NT\$25 (about CAD\$1) or NT\$ 30 (about CAD\$1.2) per kilogram without processing and let other people to extract, process, pack and sell bottled camellia oil. Only a few people now insist on make authentic camellia oil. This industry now, therefore, is only partially Chashan's industry (Interviewee CA002, 2004).

A result of the above is that many fields in Chashan have been left fallow. The incumbent chairman CA002 (Han ethnic group) of Chashan Leisure Agricultural Area shared his observations and experiences of the difficulty of promoting agriculture in Chashan:

“I have lived here for 30 years. I saw a lot of inhabitants have used their land without too many choices, because they too trusted agricultural policies of the government and have followed whatever the governors asked them to plant. The government, such as the Farmer's Association, and NGOs, such as World Vision, have regarded themselves as experts, who have had unilateral willingness to promote a variety of cash crops. They came to teach us to be able to plant, but whether the products could actually make money is difficult to say. Because of this reason, Chashan inhabitants are poor [sic].”

“Classes of production and marketing have provided people some professional assistance and subsidy. I have been through so many events, and I found that aboriginal people just followed the steps of the government because there are subsidies. They still could survive, but they did not plan their own lives, land and future. Aboriginal people are more optimistic and not so greedy, they only ask for survival.”

Currently the major economic activity of Chashan is agriculture. However, according to the data provided by Chashan village office, the proportion of the agricultural population has greatly decreased from 94.5% (male: 91.8%; female: 97.2%) in 1992 to 60.9% (male: 56.2%; female: 65.5%) in 1997. Out of the 43.8% of the males who switched their occupations, 24.7% were engaged in industrial activities. Of the 34.5% of the females who switched their occupations, 21.8% were engaged in personal services (China Rural Village Development and Planning Association, 1998). According to the survey conducted by China

Rural Village Development and Planning Association in 1998, only 34% of 47 interviewed households had their major incomes from agriculture. The fluctuating prices of major cash crops (e.g., giant bamboo, makino bamboo, ginger and taros) have made it difficult to earn an adequate income from a single occupation. Tea has been planted widely in the Alishan area and is no longer a competitive agriculture product (Interviewee, CA003, 2004). The younger generation have migrated out of the area for job opportunities. Those who have stayed in the village have changed their lifestyle from solely farming and gathering to multiple seasonal job holdings because the costs of planting a big field of crops can not be recovered (China Rural Village Development and Planning Association, 1998; informal conversation, 2004). When the income from casual labour cannot cover their children's tuition fees, many villagers have to borrow money or mortgage their lands to obtain loans and they usually do not have the money to pay off the loan. It becomes a vicious circle (Interviewee CA003, 2004). The majority of households in Chashan has large loans and over 90% of the land in Chashan is encumbered by loans. Some lands mortgaged to banks are already under auction. Villagers who have their lands leased or encumbered by loans have to migrate out of the village to find casual labour to support themselves. Even though the law states that aboriginal reserved land cannot be sold, few villagers can afford the debts and have signed private contracts to transfer the ownership of the property to creditors (Interviewee CA003, 2004).

In summary, affected by unsustainable national agricultural policies and an historic and geographical marginal position, most agricultural products produced in Chashan can hardly compete with those produced in the lowland under the market economy. The products do not have a monopolistic nature, the cost of labour and transportation is high, and there is a shortage of local markets and sales channels (Interviewees CA003, 2004; CB002, 2005). Livelihoods in Chashan, as a result, have evolved from mainly agricultural and forest-based activities in the past to mostly casual labour and migration at present.

6.5 Development Process of Chashan Village and Tourism

Similar to Shanmei, in the context of declining agricultural and forestry industries and the rise of tourism and interest in local culture in the larger society, some Chashan villagers began to think about attracting visitors to experience the local natural landscape and resources.

6.5.1 An Unsuccessful Attempt at River Protection

In 1994, a group of village cadre wanted to bring back a variety of species of fish in the Tzengwen River and to restore the environment of Chashan back to its original appearance. They established the Tourism Promotion Committee in an attempt to share the beauties of Chashan with other people and to prohibit villagers from over-fishing (Interviewee CA002, 2004). Starting in 1996, the committee also held a celebration called “Longing for the Mountain and River” to encourage villagers to appreciate and protect the rivers and mountains of Chashan. The activities consisted of two parts. River-related activities included swimming, kayaking, diving, and fishing with spears and rods competitions, while mountain-related activities included hunting and a competition based on knowledge of fauna and flora (Interviewee CA002, 2004). The mission of protecting the river only lasted for two years because the director of the Committee CA001 (a Bunun), who was a strong leader, was elected as the village head and passed the position to another villager who did not maintain the fishing ban. During the winter, many villagers place shrimp traps in the river and sell the harvested shrimps to nearby towns for cash. As fishing and shrimping were prohibited, the villagers claimed that their livelihoods were greatly affected. The villagers negotiated with the second director that they would only use shrimp traps to catch shrimps and would not use electrocution or nets to maintain the quantity of the shrimp catch. Eventually, the decision was made that villagers could place shrimp traps to catch shrimps. In the beginning, the villagers obeyed the rule, but as time went by, some villagers set bigger nets in the river and used electrocution to catch fish. The attempt at river protection failed (Interviewee CA002, 2004, 2005).

6.5.2 Promotion of Chashan as a Tribal Park

CA001 is a Bunun and married a Cou. She was the previous village head, the elder of Chashan Presbyterian Church, and the previous general executive of Chashan Community Development Association. Since she was elected as the village head in 1996, she has served in the position for 8 years. She shared her concern about Chashan villagers’ livelihoods and her plans from the past to the present as follows:

“...in the past we obtained more profit if we planted more plums, however, it came out that recently planting more means more loss. We cannot only rely on agricultural production nowadays. Some of our products overlap with those imported. When imported goods are better than ours, we cannot compete. The only solution is to combine recreation with agriculture, combining a taste of rich indigenous culture, natural environment, and agriculture. A special process is necessary to enhance the quality of products as secondary economic activities. Through attracting visitors, we promote leisure agriculture through our services. Service is very important to promote our products. Thus it evolves to a more complex line in contrast with the past. Before you only needed to plant and take care of the crops, now you have production, processing, packaging, promotion and marketing. Promotion is not only a must in an outside market, but also in a local market to attract more people to come to the village.”

At the time, the government promoted modernization of rural people's lives and industrialization of agricultural production. She diligently applied for funding from several government organizations to improve the living environment and living standard of the village. CA001 invited villagers to participate in the process of village planning and construction instead of having experts and a contractor to carry out all the tasks. The vision of the plan was to make Chashan village into a tribal park, with a good living quality and environment for older people and future generations. The idea was to take advantage of the resources of the whole village to attract tourists, where the village itself would be considered to be a natural and cultural park with some households as homestays, some as arts studios, and others as cafés and restaurants (Interviewee CA001, 2004, 2005).

The plan has three stages. The first stage is basic construction including the improvement of road conditions and public facilities. Villagers had a dream in mind: as the roads are paved, visitors of Danayigu Ecological Park will have access to scenic spots in Chashan, such as Bat Grotto and Dashih Cliff. Villagers also collectively built a BBQ camping area near the Dagubuyan River for evening entertainment for future visitors. It took almost a year before trees started to grow and flowers to flourish in the camping area. The priest even came to bless the place and officially opened it in 1995. Three days later, a severe typhoon came with heavy rain and a flood: the camping area was wiped out (Interviewee CA001, 2004; Chashan village office and Chashan Community Development Association, 1999).

At the time, the roads were all paved from Chashan to Shanmei. Villagers believed that tourists in Shanmei would make their way to Chashan but no-one came. Later, the villagers made signs to direct people to the scenic spots, such as Bat Grotto Cave and Stalactite Cave. People came by themselves following the signs. They brought their own food and some of them even got lost in the Bat Grotto Cave and the villagers had to rescue them. Some of the stalactites were knocked off. Bats in the cave were scared away because visitors used fireworks and barbequed inside the cave. The population of bats dropped from over 1000 to 100. Litter was everywhere. Some villagers' property was destroyed. In the end, villagers removed the signs to reduce the destruction. The villagers were worried and realized that the village itself did not have many attractions, so few tourists came and did not stop long (Interviewee CA001, 2004).

The second stage of the plan is the development of leisure agriculture (Chashan village office and Chashan Community Development Association, 1999). CA001 started by encouraging villagers to return to a traditional lifestyle, being farmers, planting crops and raising livestock (2004). Then, progress would continue with the improvement of the environment of crop production, strengthening various skills of villagers so that local crops could be produced, processed, packaged, promoted and become local specialties with added value for direct sale to customers (Interviewees CA001, CA002, 2004, 2005)). She also encouraged each household to run a business on a small scale, such as running a homestay business, food and beverage business, and handicraft business, so local specialties could be sold to tourists. To prevent monopolies, she started by gathering the members of the Presbyterian Church and establishing "Strategic Alliances" in which each business/skill would be run by co-operating households so that all could make some profits. For example, if household A runs a homestay business, household B runs an eatery and household C raises livestock and produces crops, then household C can supply its raw materials to household B to make dishes to serve tourists staying with household A (Interviewee CA001, 2004).

In the beginning (around 1998-1999), she and other village cadres faced many challenges to promote the plan. For example, the majority of villagers are farmers and no-one knew what a homestay was and they were unsure whether tourists would come. As a result, most villagers were unwilling to spend time and money to clean out extra rooms or construct extra facilities (e.g., toilets) even though the Council of Indigenous Peoples provided partial

subsidies to encourage the development of homestay businesses. Only six households cleaned out extra rooms as homestays, including some village cadres and a few members of the Presbyterian Church (Interviewees CA001, CA002, 2004, 2005).

Preserving the natural environment was also to be an important task in stage two. Hunting was prohibited within one kilometre of the village. Certain fruit trees were planted to attract wild birds. The use of pesticides was reduced so that fireflies, field snails and frogs would come back (Chashan village office and Chashan Community Development Association, 1999).

The third stage is the beautification of the environment, skill development in service industries, bringing back traditional culture into the current life and passing it on to the next generation, and the development of festivals and celebrations (Chashan village office and Chashan Community Development Association, 1999). To implement the idea of making the village into a natural park, CA001 advocated that the park be built from each household's garden. She encouraged villagers to remove cement and plant trees and flowers. As more and more household did so, visitors would find flowers throughout the village. Before environmental beautification, cars only passed by. After such improvements, cars stopped and people came out of the cars and looked around the village. That is how Chashan started to become known. After Chashan had gained a reputation, the village cadre actively promoted homestay businesses (Interviewees CA001, 2004).

To enable villagers to obtain the skills to engage in tourism enterprises, CA001 asked them to go to workshops to learn how to cook, make snacks and drinks, dye clothing, weave bamboo and tend gardens (Interviewee CA002, 2004). However, it was more challenging to decide how to bring traditional culture into current life so that Chashan could become a tribal park with a unique aboriginal cultural atmosphere. CA001 encouraged households running homestays to use local material (i.e., bamboo and lumber) to build and /or decorate their houses instead of using reinforcing bar and concrete (Interviewees CA001, CC001, 2004). A campfire party is held every Saturday night and the Ceayama band sings and dances for tourists. The above measures, however, were not enough to provide a symbol representing Chashan to the public. Chashan is a relatively new village, which consists of three ethnic groups who immigrated to the place in the past 50 years. It is not the center of Cou culture. In the beginning, the village cadre did not know how to present Chashan's culture, but later

they found that a thatch pavilion is common to the culture of the three ethnic groups and can be used as a symbol (Interviewee CA002, 2004).

The Pavilion Festival – the shared culture of Cou, Han, and Bunun people

Origin

The pavilion (*hufu*) culture of Chashan village is a symbol of the spirit of sharing, which lasts among the villagers of Chashan to this day. In former times, the Cou traditionally buried their dead inside their homes, and it was thus forbidden to make excessive noise inside a house so as not to disturb the spirits of the deceased. All loud celebrations therefore take place outside (Alishan National Scenic Area Administration, 2004a). The *hufu* outside has therefore become a gathering place where tribesmen **share** their game after returning home from hunting expeditions. Although the practice of home burial has long been outlawed since the Japanese colonial period, the villagers continue to build pavilions in their backyards in the old way to preserve the traditions of the tribe (Alishan National Scenic Area Administration, 2004a). They have built 80 *hufus* collectively in the past several years, which distinguishes Chashan from other Cou villages. Inside the *hufus*, one can often see wood chimes, totems and carved wood items that have moving stories behind them (Alishan National Scenic Area Administration, 2004a). This is not only for decoration, but also contains implicit meaning of self-introspection and passing on the culture to next generations. For example, the pavilion that won first place in the second pavilion festival was furnished with various kinds of Cou traditional crops and agricultural utensils. Its woodcarving demonstrated one warrior holding a torch and fish spear. Cou clansmen originally used spears to catch fish only at night. The carving reminded clansmen to treasure the rivers and natural environment, not to electrocute and use poison to catch fish (Alishan National Scenic Area Administration, 2004a). These carved figures, like the *hufus*, also vary in style between the three main ethnic groups in Chashan. The Cou produce figures with feathered caps and have round *hufus* with a circular exterior and hexagonal interior. The Bunun figures have horn-shaped hats and oblong *hufus*, and Han Chinese villagers make figures with broad-rimmed hats and build their *hufus* with bamboo. These structures are also testimony to the harmonious relationships among the three groups in Chashan (Alishan National Scenic Area Administration, 2004a).

The First Pavilion Festival

In order to promote the modernization of the environment of Aboriginal peoples, starting in 1999, the Council of Indigenous Peoples promoted the plan of “Building a new facet of tribes”.

Chashan was selected as one of the three model communities in Taiwan for demonstration purposes. Because each household has at least one pavilion in its backyard, a pavilion became a symbol of Chashan to show their culture (Interviewees CA001, CA002, 2004, 2005). In 1999, to celebrate the changing facet of Chashan that was gradually moving it away from poverty and backwardness, through the assistance of Chashan Presbyterian Church, CA001 invited the heads of five neighbourhood units to get together to have fun. Because the media reported the event, guests (about 100) from outside also came to join the event. As an increased number of people visited the place, the village cadre decided to hold the festival every year to bring more tourists to Chashan (Interviewee CA002, 2005).

The Pavilion Cultural Festival has occurred every year for the past 6 years (except in 2004 due to the time conflict with the Cou tribe's *Fona* (Vitality Bean) Festival), organized by the committee of Chashan Leisure Agricultural Area and Chashan Community Development Association (Interviewee CA002, 2005). Funds for the activity have come from government subsidies. Activities of the festival include a *Hufu* (pavilion) "beauty" competition, a tribal banquet, a tour of the village and a campfire party. The pavilion competition has visitors and guests vote for the winner in accordance with its structure, modelling, ornament, the host's style, the surrounding environment, etc. Villagers use this chance to share the culture of Cou and Bunun pavilions with visitors. Hundreds of people attend each year and this has created demand for accommodation (Jiang, 2000). Table 6-3 lists multiple effects of the Pavilion Festival (Interviewee, CA002, CA013, 2005; informal conversation, 2004, 2005).

Table 6-3: Effects of the Pavilion Festival

1. Revitalize and make connection with traditional Cou culture.
2. Provide an occasion for villagers to get together and promote villagers' cohesion and harmony through planning and managing the activity together.
3. Chashan has become more well known and an increasing number of visitors are coming to the village. This is particularly beneficial to households that run homestays and guesthouses.
4. Most villagers have the intention to engage in economic activities related to tourism but are unsure where to start. One major goal of the festival is to prepare local farmers to develop the concept and habit of display and sale of local specialties on the spot by putting self-produced agricultural products in their own or others' pavilions. Once local farmers are used to marketing their products, they might choose to set up shelves and sell local specialties to tourists every weekend and increase the chances of making cash earning. Community cadre hope that this can put the goal of having tourism drive the revitalization of agriculture into practice and make the majority of villagers feel that not only households that run homestays benefit from tourism.
5. Subsidies provided by the government were used to create opportunities to make cash earning, such as through the maintenance and decoration of pavilions.
6. Creates a market for the sale of local agricultural products in pavilions.
7. Makes contacts for the sale of future product.
8. Creates opportunities to make cash earning, such as through the sale of food and beverages.

From interviewees CA002, CA013 (2005); informal conversation (2005)

6.6 Organizations and Institutions

6.6.1 Chashan Leisure Agricultural Area

Under the leadership of CA001, the vision of making Chashan into a tribal park has gradually been implemented. In 2001, she and some village cadre also went to the Council of Agriculture to apply to make Chashan into a Leisure Agricultural Area. Leisure Agricultural Areas are one of many national policies to promote domestic tourism. It is hoped that the development of recreational agriculture and the fishery in rural villages can enhance the local economy and create employment opportunities. By shifting the traditional practice of agriculture to a combination of agriculture with travel and education, abandoned farmland can be put into different kinds of use again (Interviewees, CA001, CA002, 2004, 2005). The idea is demonstrated by Figure 6-2.

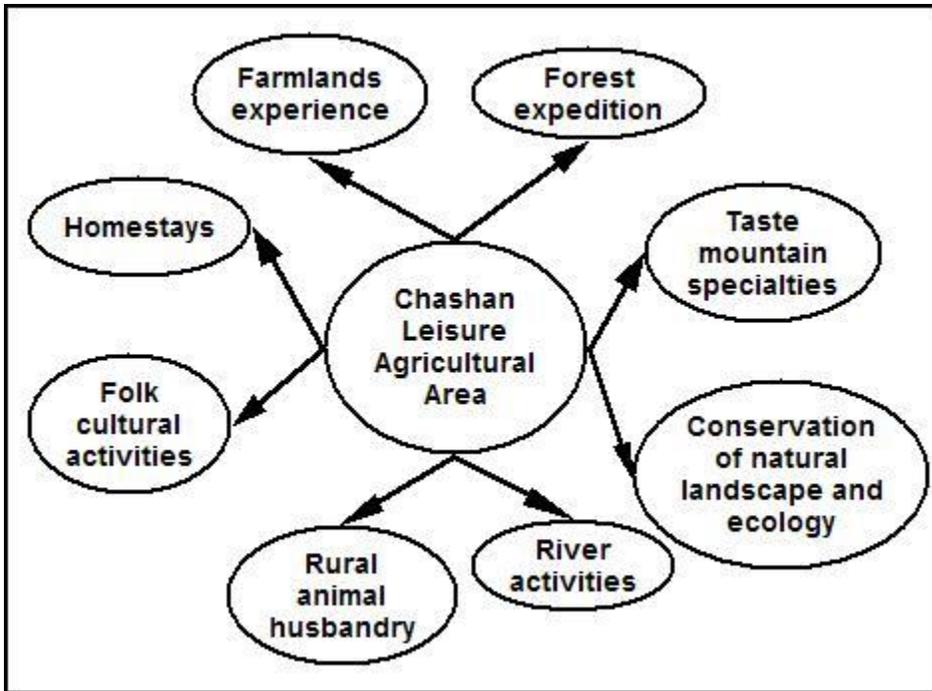


Figure 6-2: Integrated Development of Chashan Leisure Agricultural Area

From Li (n.d. p.1)

As CA001 (2004) commented, it is very difficult to have all of the components well developed. One section might be very strong (e.g., homestays), while the others might be very weak (e.g., rural animal husbandry). The idea is based on the appreciation that it is impossible for everyone in the village to be engaged in tourism and recreation and that agriculture should be the foundation of the tourism industry. If the agricultural component is removed, then the term should be tourism/travel industry instead of recreational agriculture industry. CA001 commented that she does not like the term tourism (the meaning in Chinese is close to sight-seeing) because it implies satisfying tourists' motivations of seeing 'other' cultures that are primitive and exotic, paying less attention to local people's benefits and feelings. As the chairman (CA002, 2005) of Chashan Leisure Agricultural Area emphasized, if mental and physical effort is only devoted into the tourism and travel industry, community development would only be superficial and the gap between the rich and the poor would become greater. He claimed that funds from Alishan National Scenic Area Administration should not only be used to build trails and performance halls to attract more tourists but

should also be used to revitalize local agriculture, put abandoned farm land into use again, and upgrade the primary economic activity to secondary, tertiary, and even quaternary economic activities. In these ways rural people might be able to survive as Taiwan shifts from an industrial towards a service- and high-tech-based economy. For example, taro sold raw is primary activity; when cooked, it becomes secondary activity; when cooked, packaged, and commercialized, it becomes tertiary activity; when cooked and served as a dish to visitors and visitors like the dish and decide to buy a **well-packaged** taro product as a gift for friends, it becomes quaternary economic activity. With an increasing number of visitors coming to Chashan, if local farmers' livelihoods can be supported by sales of canned bamboo shoots and by having visitors **experience** bamboo shoot harvesting, they might choose agriculture instead of unstable casual labour. To expand the positive effects of tourism, supplying homestays with locally produced crops and livestock is not enough because the quantity is small and the demand is unstable. It is more important is to provide education and assistance to Chashan farmers to have brand recognition of well-packaged agricultural products of high quality that consumers are willing to buy for their own consumption and as a gift. Once the brand gains consumer acceptance and consumers buy by brand name, the increasing demand for agricultural products stirred up by tourism would create a future for Chashan agriculture. But what should be done to make people think of Chashan when they think of camellia oil? Local farmers face a number of challenges including incorporating the service industry into their daily lives, upgrading economic activities from primary to tertiary and even quaternary, establishing a reputation for their agricultural products, and learning how to market them. All of these need funding, skills and professional assistance.

The difficulty of combining current agriculture products with tourism

Agricultural products, such as bamboo shoots, ginger and taros, easily get spoiled (usually two days after harvest). They need to be processed and packaged to be sold to tourists (Interviewee CA003, 2004). Processing requires machinery, storage rooms, and refrigerators. Chashan villagers do not have the money and skills to purchase, operate and maintain the machines. Besides, the sale of packaged agricultural products needs time, marketing skills, sales channels and stable markets. Villagers are short of the above assets and unwilling to bear the risk of lack of sales (Interviewee CA002, 2004). Given the shortage of cash and urgent cash needs, villagers usually choose to sell the products directly to wholesalers from

nearby towns at much lower prices because they can obtain cash immediately and solve the urgent difficulty at the moment. For example, fresh taros are sold to a nearby town at NT\$4 (CAD\$ 0.16)/kilo while cleaned, chopped, and packaged taros can be sold at NT\$50 (CAD\$2)/kilo (Interviewee CA002, 2005). Villagers still choose the former because the latter takes a much longer time to get cash and involves a greater risk if the product is not sold. The prices offered by middlemen usually cannot even cover production expenses and that is why many fields in Chashan are not in production (Interviewees CA002, CA003, CA006, CA007, 2004)

After Chashan was evaluated as one of several fine leisure agricultural areas, opportunities to market Chashan and Alishan as a tourist destination and to sell local agricultural products have increased. CA001 and the Ceayama band have often been invited to host and/or perform in fairs of agricultural products and international travel fairs. Chashan has gradually become better known and its homestay business has become prosperous.

Strategic Alliances

As described earlier, the idea of “Strategic Alliances” is based on the spirit of sharing and to have different small businesses co-operate with each other, so that households that run homestays can promote the sale of other villagers’ crops, livestock and services. In order to increase the number of villagers’ involved in tourism development, a village cadre (i.e. mainly the previous village head CA001) provided their private property to the public to initiate a mechanism of sharing (Luo, 2004). Accompanied with government funding, Chashan set up the following community public facilities (on private property) and organizations: the Cayama band mainly composed of members of Presbyterian Church, a parking lot, Mother Tain Eatery (mainly providing meals to visitors in homestays) and a performance square. The group of people who offered and shared common resources helped each other and used common facilities to run a homestay business. They took “sharing common resources” and “cooperation” as their core value. The value is reflected in the operation of the homestay business (Luo, 2004). In early stage of tourism, when a tour bus came, tourists were divided among seven houses with homestays. Villagers not running homestays were divided into groups to provide different services to make cash. Some provided transportation services, some were responsible for the preparation of meals and others supplied their crops and livestock. For example, membership of Mother Tian Eatery was divided into three groups:

cuisine, mountain-plant use, and logistics. The cuisine group only accepted reservations for meals in advance, so ingredients could be ordered from local residents, ensuring their freshness. The mountain-plant group used wild plants from the mountains to produce drinks, such as jelly fig, so customers could see the procedure of drink production. The logistics operation group purchased livestock, agricultural products and handicrafts produced by local residents and supply to Mother Tian Eatery and homestay proprietors. In this way, producers could sell their products on the spot and the exploitation of middlemen was avoided.

Institutionalized division of labour had gradually emerged and it has the following advantages. It reduces the operating cost and enables product quality to be improved through the efficient division of labour, from the setting-up of a single contact for homestay reservation, the arrangement of visitors' transportation, the preparation of meals, the services of tour guides, to the performance of the night party (Luo, 2004). All tasks maintain quality because the different groups monitor each other. The mechanism heavily relies on trust. Moreover, the institution of the division of labour can be further strengthened when it obtains a public identity because villagers see that benefits and resources are shared fairly (Luo, 2004).

Nevertheless, as time went by, those homestays /guesthouses that provided the best service retained the tourists who became repeat customers and introduced their friends. A few individuals who have secured large loans for guesthouses or have been successful in the homestay business wanted to expand by increasing the number of rooms, improving the quality of the accommodations, building their own restaurants and having their own customers. As their businesses have grown, they have gradually separated themselves from the alliances. The ideal that CA001 advocated to have even benefit-sharing from tourism development through work distribution and cooperation, and to develop the recreation industry on a small scale (250 visitors/day) and at a slow pace has gradually faded away. At present, out of 13 households who run homestays, only four of them are members of the Strategic Alliances. They are also members of the Presbyterian Church and continue to support the ideas of CA001. The quality of their rooms are about the same (shared rooms), making it easier to reach consensus on the prices of the rooms and packaged tours.

Another reason for the unsuccessful operation of the institution suggested by several younger villagers in their thirties is CA001's unclear statement concerning the inflow and expenditure of the money that comes from the government as subsidies and requires each

homestay proprietor to feed back to the fund (Interviewees CA002, CA009, CB002, CE002, 2004; informal conversation, 2004). Originally, the homestays under the Strategic Alliances contributed part of their income to the institution as a common reserve fund for various purposes, such as maintenance of hiking trails and repair of damaged scenic spots caused by typhoons. It is commonly expressed by villagers in the thirties that CA001 collected the money but did not provide a clear explanation on how the money had been used. This incurred the antipathy of villagers and was the major reason why CA001 was not re-elected as a village head after eight years (informal conversation, 2004). A village cadre CA002 (2004) indicated that CA001 did not take the funds but because she did not keep good track of every receipt and expenditure; at the end she could not remember the details. This is a common problem in aboriginal villages where sound financial management and good control of accounting practices are rare. It is commonly expressed that CA001 tends to corner community resources and establish her own position prior to hearing the views of others when making group decisions dealing with community's affairs (Interviews, 2004; 2005)

The re-election of the village head and the chair of the board of the directors shows that Chashan failed to adjust to all sorts of challenges. Criticisms often took the form of a personal attack, such as the leader does not make a clear distinction between public and private interests, the accounting system is not clear, arbitrarily divided power, etc. This frustrated the leader who took reciprocity as the starting point of her actions and frustrated and disappointed the original leadership team. They took back their personal contribution to public facilities, which further reduced the level of trust within the community (Luo, 2004)

Under the organizational structure of Chashan Leisure Agricultural Area (Figure 6-3), several industries and tourism enterprises have been proposed and developed, such as homestays, food and beverage, processing of camellia oil and mountain tea, and singing and dancing. However, as a decreasing number of villagers engaged in agricultural activities and because of the lack of collective income to support the operation of the organization, the groups have not operated for three years (Interviewee CA006, 2004). In the past two years, CA001 and the chairman of the organization proposed charging a membership fee in the hope that combined with subsidies from Council of Agriculture, the organization could continue to operate. At the time of the research in 2005, the number of members was 27 (Interviewees CA001, CA002, 2005).

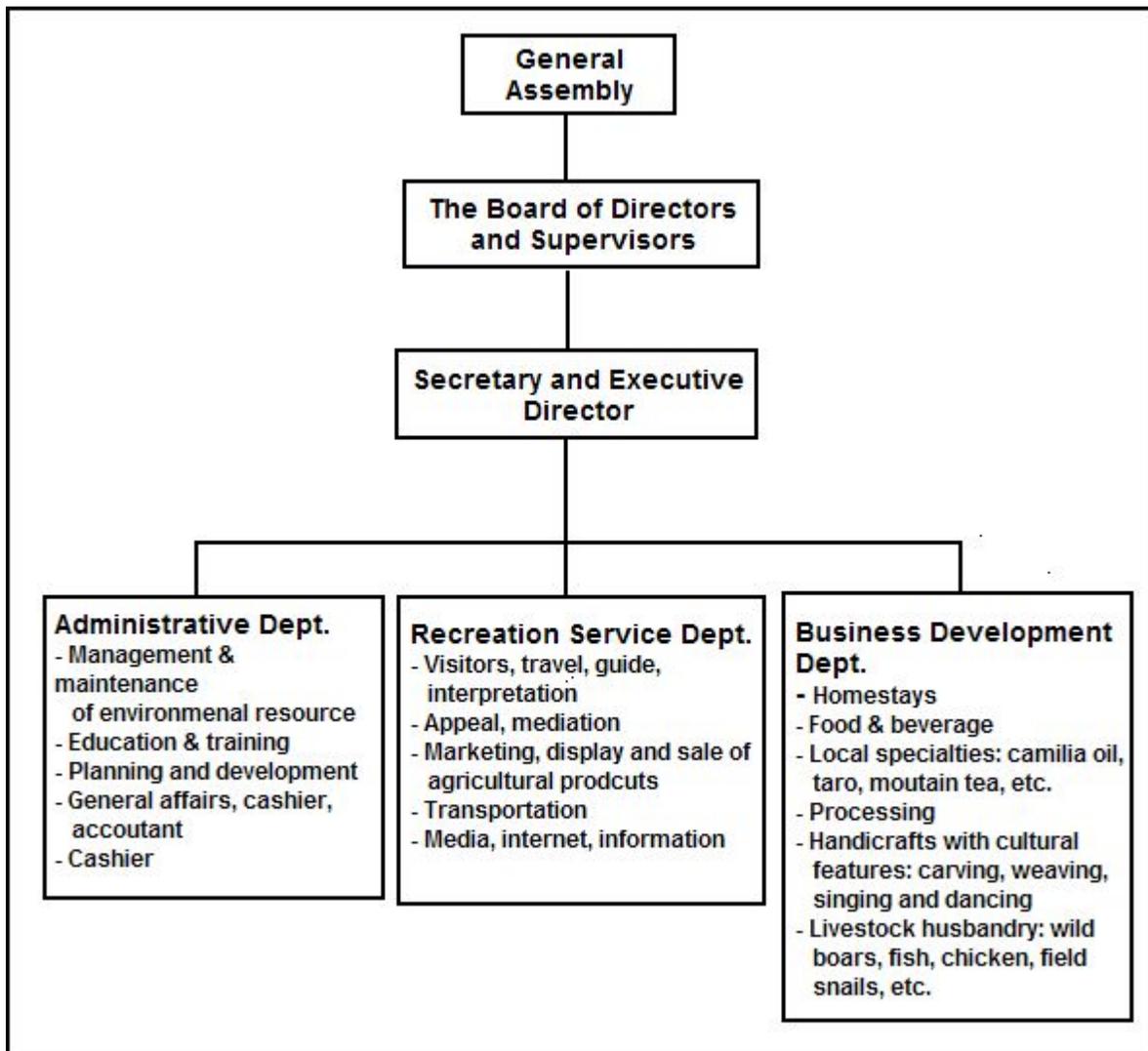


Figure 6-3: The Organizational Structure of Chashan Leisure Agricultural Area Development Association (as in November 2005)

From Li (n.d. p.5)

6.6.2 Chashan Community Development Association

In addition to Chashan Leisure Agricultural Area, another major organization is Chashan Community Development Association, which is the main contact organization of government organizations, such as Alishan National Scenic Area Administration, the Forestry Bureau and Alishan Township Administration. It was established in 1997. There were about 100 members in 2005 (Chashan Community Development Association, 2005). A membership fee (registration NT\$300 (CAD\$12)/person; annual fee NT\$500 (CAD\$20)/person) was charged for several years but stopped in 2003. Since then, its operation has depended on subsidies from several government organizations. As a result, its independence is weak and it tends to be directed by the government organizations (Interviewee CA002, 2004). Figure 6-4 shows the organizational structure of Chashan Community Development Association. There are 15 board directors including the chair, the general executive, and general affairs. Besides, there are 5 supervisors, also including the chair. They are elected every three years through the General Assembly, not by customary procedures, by the members of the association who are over 20 years old. The chair of the board of directors is elected by the board of directors (Chashan Community Development Association, 2005). These 15 people have decision-making power with regard to some aspects of community development.

Under the organizational structure of Chashan Community Development Association (CCDA) (Figure 6-4), a tourism enterprise promotion group was established. At present, however, only food and beverage and dancing groups operate (Chashan Community Development Association, 2005). The groups and their business overlap with those of the Business Development Department of Chashan Leisure Agricultural Area Development Association (CLAADA). Half of the personnel of the CCDA are also members of CLAADA. Responsibilities of each organization are not assigned clearly. The situation has caused waste of community resources and manpower and has made implementation of community affairs inefficient. For example, the government provided funding to build pavilions but there is no consensus on which organization is responsible for maintenance (Interviewee CA003, 2004). Many villagers expressed the necessity of merging the two organizations or establishing a communication platform between them (Interviewees CA003, CA003, CA008, CA009, CB004, CC001, CC002, 2004). Several such attempts have been made but have not

succeeded (Interviewees CC001, CC002, CA009, 2004). As one board director (CA003, 2004) indicated concerning the importance of merging the two organizations:

“The promotion of tourism enterprises is one major task of CCDA, but that is not enough. Tourism planning is more than to hold a pavilion festival. It cannot be separated from other industries, such as how to package our agricultural products, how to use local crops and livestock to produce dishes to serve tourists in homestays business...”

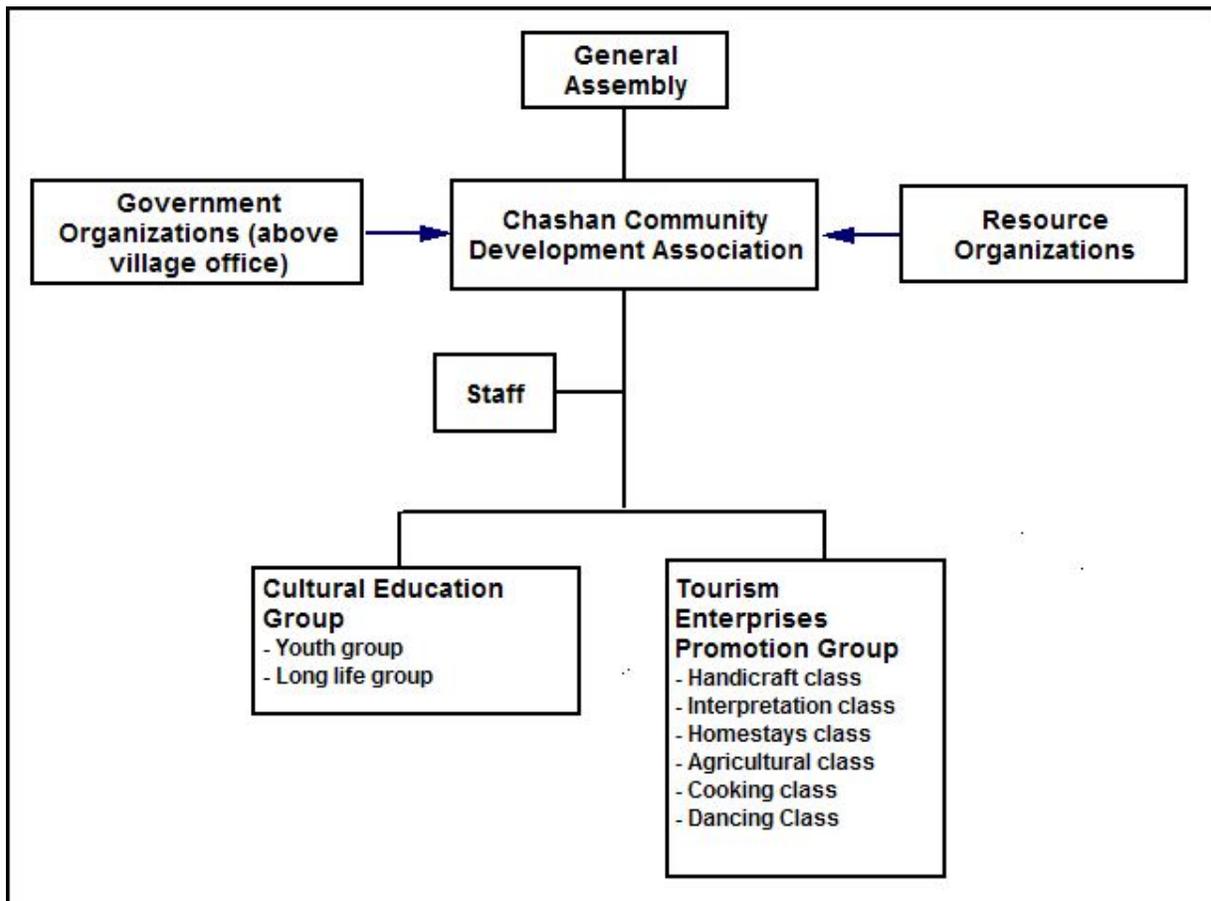


Figure 6-4: The Organizational Structure of Chashan Community Development Association

From Chashan Community Development Association. (2005, May p.26)

One main reason for the present situation has arisen from when CA001 served as a village head and she was also the general executive of CCDA and the leading cadre of

CLAADA. She is a very capable person who has drawn many resources from different government organizations and put them into community construction through the village office, CCDA and CLAADA. Nevertheless, it was commonly felt that her strong leadership did not create well-established regulations and organizational systems, especially the regulation of personnel. After CA001 left the positions, she did not pass on documents and her personal experiences with Chashan development to the incumbent village head and the chair of the board of directors of CCDA. She is not sure whether the successors will continue her ideas and plans, so she combines the members of CLAADA and the Presbyterian Church to continue with her plan without communication with CCDA and the village office (Interviewee CC001, 2004; informal conversation, 2004). Under the political administrative system, CLAADA is under the jurisdiction of CCDA and it must go through CCDA to apply for funds, but she often bypasses CCDA to apply for funds from certain government organizations (Interviewee CC001, 2004). At present, there are three factions in Chashan, CLAADA, CCDA and the village office, and most villagers expressed that there is no common occasion to express their opinions and suggestions, and to discuss community issues collectively ((Interviewees CA003, CA003, CA008, CA009, CB004, CC001, CC002, 2004). The Cou minister of the Presbyterian Church CC001 (2004) expressed his concern as follows:

“Some villagers do not rely on the community development association and expand their own homestays and restaurants; others possess the attitude of wait and see, they come to co-operate when things work well and if not, they do things by themselves. However, minding your own business is not good to the tribe. Faction formation in a small village, no matter organization or individual, is not good. So-called good is the link to Cou collective knowledge to manage a tribe as in the past. Decisions and knowledge are made and created collectively. So-called not good is a separation such that you would be unable to recognize this is a Cou village. We have been imprinted by traditional Cou structures, unless you intend to be separated from Cou identity.... .”

Another reason for factions is that the village consists of multiple ethnic groups (i.e. Cou, Bunun, and Han), which have different social, cultural, and historical backgrounds. The ideas of promoting the development of the village are not the same (Interviewees SA010, CE001, 2004). Several villagers commented that only a person with strong leadership

qualities and with an open and tolerant heart is able to unite diverse opinions to reach consensus (informal conversation, 2004).

6.7 Overview of Current Livelihoods

After many attempts and much effort for nearly eight years, Chashan villagers successfully applied the spirit of sharing of Cou tradition and merged it with Bunun and Han culture and pavilion culture became an image of Chashan. The establishment of a Leisure Agricultural Area has provided a direction that has encouraged a number of villagers to attempt to combine tourism and agriculture, although a lot of internal and external obstacles still need to be overcome. The rise of homestays /guesthouse businesses has created a range of opportunities to make cash earnings. This section will examine how tourism-related activities have been incorporated into the overall livelihood spectrum of Chashan. More specifically, their contribution to local livelihoods and their competition with and complementarities to other economic activities will be explored. What new livelihood resources are being accumulated? The extent to which tourism development and management have been experienced by different groups (mainly by sex and age) as positive (opportunities, benefits, and/or advantages) or negative (threats, costs, and/or disadvantages) will be documented on individual, household and community scales.

6.7.1 Introduction

As in Shanmei, most households rely on a combination of activities to meet their needs and to disperse risk. A wide range of resources and livelihood strategies is employed by Chashan households: wage employment (regular and occasional), migration, crop production, livestock husbandry, harvesting of trees, plants and mountain resources, fishing, hunting, and tourism enterprises. The significance of tourism activities to villagers will be assessed in the context of this wide array of livelihood strategies.

Households in Chashan have had an increasing need for cash. Rural families now use money to purchase necessities, including food, because not enough is grown, reared or collected at home; for paying school and clinic fees, for buying clothes, and for purchasing small daily needs such as soap and gas, as well as for large items including motorcycles and trucks. For a decreasing number of villagers who are still engaged in farming during certain

times of the year, money is invested in new crops, fertilizer, labour, pesticides and tools. Individuals who run homestays /guesthouses and eateries purchase ingredients (e.g., vegetables, fish, meat) in nearby towns or Jiayi city.

As indicated in Table 6-4, over two fifths (41.4%) of Chashan population is not in the workforce, including pre-school children (9.6%), students (22.6%) and residents who are retired, unable to work and disable (9.2%). Nearly one fifth (19.3%) of the Chashan population make a living outside the village. Less than two fifth (39.3%) of the population with work ability reside in the village.

Table 6-4: The Distribution of Chashan Workforce and Non-workforce

	<u>n</u>	<u>%</u>
Preschool Children	47	9.6
Students	111	22.6
Retired, unable to work, & disable	45	9.2
Migration	95	19.3
Pop. with work ability reside in the village	193	39.3
Total	491	100

Note. Based on interviews conducted in November 2005, the situation changes from time to time

Table 6-5 provides an overview of economic activities in Chashan village and their proportional distribution. The activities are divided into two categories: non-tourism activities and tourism-related positions and activities. In all livelihood activities and strategies, employment, primarily by odd jobs and labour (38.5%), accounts for the largest proportion (48.2%). This is followed by farming and harvesting for cash (34.7%), and migration (33%). The proportion of tourism-related activities ranges from 14.6 to 21.5% and is extremely unstable, depending on the number of visitors.

Table 6-5: Economic Activities of Chashan Population with Work Ability

			<u>n</u>	<u>%</u>
Total			288	
Non tourism related activities	Migration	With productivity	84	29.2
		Without productivity	11	3.8
	Employment	Permanent jobs in Alishan area	22	7.6
		Odd job & labour	111	38.5
		Army	6	2.1
		Retail businesses	12	4.2
		Farming (crops & livestock) & harvesting (bamboos & mountain products) for cash	100	34.7
		Hunting	12	4.2
		No work	13	4.5
		Un known	7	2.4
Tourism related activities		Tourism enterprises	42	14.6
		Tourism related cash earning	20	6.9
		Sub total	62	21.5

Note. Based on interviews conducted in November 2005, the situation changes from time to time

6.7.2 Livelihood Activities Not Related to Tourism

Crop production

Benefits

1) *Subsistence Food*

Almost every household produces several kinds of vegetables. The majority of residents under age 40 are not engaged in agriculture production. The diversity and quantity of the crops produced in the majority of households in Chashan are insufficient for them to be self-sustaining. Therefore, similar to Shanmei, they purchase food from a truck from Jiayi City which arrives every morning, from friends and relatives in other Cou villages, or they go to the city and purchase foodstuffs there.

2) *Cash Crops: Cash Income*

Most fields in Chashan are covered with a variety of bamboos, which occupies 57.89% of the total cultivated land. Giant bamboo is the main crop, followed by camellia and betel. The area of bamboos and camellia occupies 73.79% of the total cultivated land. In recent years, the following crops have also been cultivated: plum, mountain tea, ginger, taro, corn, fragrant rice, mountain sugar cane, and a variety of fast-growing vegetables (China Rural Village

Development and Planning Association, 1998; Tai-Yi Associates, Inc., 2003). Several households that make a living mainly by selling cash crops usually cultivate multiple crops to reduce the risk of fluctuating market prices for different items. Some cash crops can be left in the soil for a while (e.g., ginger) awaiting a better market price; others are left untended (e.g., wasabi) or not harvested (e.g., plum) due to low market prices (Interviewees CA006, CA007, CB002, CD011, 2004, 2005).

According to the seasonal nature of agriculture (Figure 6-5), in three southern villages, Shanmei, Xinmei, Chashan, in particular, bamboo shoots are harvested twice a year. The harvest season of giant bamboo shoots is from August to September, makino bamboo shoots is from April to May and taro from November to December (Alishan National Scenic Area, . The majority of the crops are sold to middlemen or nearby towns for less than half final prices. The crops then are processed by the middlemen because they have storage facilities such as huge refrigerators and warehouses, processing machines, and markets to sell the products. During the growing seasons of the above crops, farmers undertake any other economic opportunity outside the village to increase their income. The ex-head (Cou) CA006 (2004) of neighbourhood unit one and one current board director CA007 (2004) of Chashan Community Development Association stated that usually the income from cash crops cannot even meet their children's tuition fees and the majority of villagers use their land as collateral to obtain loans from banks or sublease their lands to lowlanders for various economic activities.

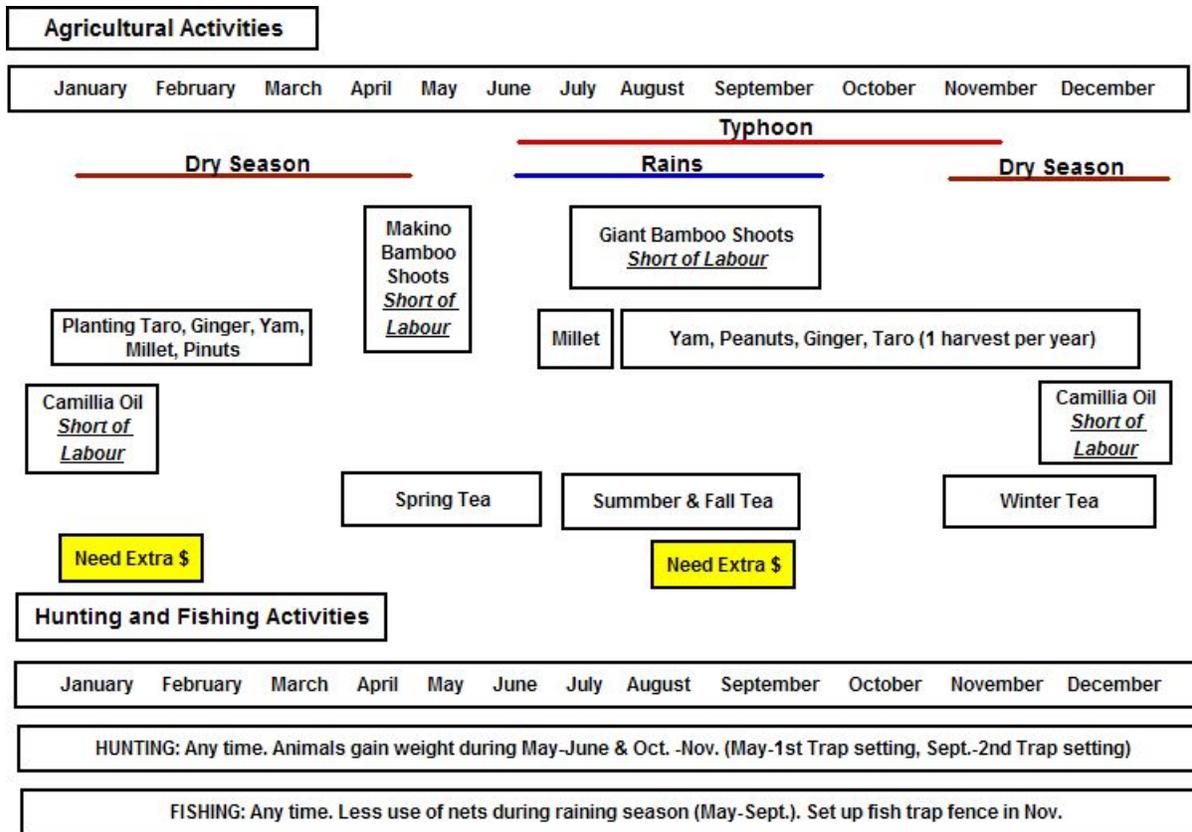


Figure 6-5: Seasonal Calendar of Activities and Events Southern Villages (*Shanmei, Xinmei, Chashan*)

From Interviewees CA001, SA005 (2005).

Harvesting makino and giant bamboo shoots planted by their ancestors used to be the main income source for Chashan residents. As in Shanmei, the cash earned by selling two trucks of bamboo shoots in Chashan used to be able to cover the registration fee of a school semester but it is not the case now (Interviewees CA008, CA007, 2004). However, as tourism enterprises increase in Chashan, the mountain resources can be harvested and sold to tourists directly or can be processed as new products with added value (Interviewees CA003, CA007, CC004, 2004, 2005). For example, bamboo shoots are made into different dishes and sold in homestays, restaurants and eateries. They are also carried to factories in nearby towns for initial processing (Interviewee CA006, 2005). Barrels and packages of processed bamboo shoots are sold to tourists directly (Interviewee CA003, 2005). Also, as more and more

tourists come to Chashan, a small proportion of the crops are used to supply restaurants, eateries, homestays and guesthouses and are also sold to tourists directly.

In the past two years, the government also assisted the growing of coffee beans. Alishan Farmers' Association agreed that it would buy coffee beans at a fixed price (Interviewee CA006, 2004). An increasing number of villagers in neighbourhood unit one have planted coffee nursery stock. Similar to tea, coffee trees can be harvested for several years and coffee beans are not easily spoiled. Some proportion of the beans is transported to the farmers' association and the rest is sold to tourists directly (Interviewees CA006, CA007, CA009, 2004). Some villagers who have planted coffee beans also attend the class on how to cultivate, harvest, and roast coffee beans and how to make coffee. Villagers with the intention to run a café business in the future benefit from the class by gaining various skills needed to upgrade economic activities from primary (planting coffee beans) to tertiary (running café as a service industry: leisure agriculture) (Interviewees CE009, CD010, 2005). A number of villagers, however, do not have cash to purchase the coffee nursery stock.

Tea production

At present, tea and betel are still cash crops with relatively high value. Several households in Chashan are engaged in tea production. Half of them do not own land and have to rent land from the government to cultivate tea trees² (Interviewee CA002, CD006, 2005). As described in the previous chapter, tea picking generally takes place 3 to 4 times annually, depending on precipitation, market price, and the availability of cash, labour, and time. Once tea is processed, producers are then busy finding customers to buy the product. The price of tea has gradually dropped in recent years and, to cope with the situation, households that produce tea also sell diversified mountain resources and agricultural products (e.g., camellia oil, plum vinegar, jelly fig, honey) produced by themselves and others to increase cash income (Interviewees CA002, CB006, CD006, CE020, 2005).

Planting wasabi

Several households plant wasabi at high altitudes on Ali Mountain to earn cash. It takes about 2-3 hours for a one-way drive from Chashan to the wasabi fields, reducing the time spent with

² The majority of Han people in Chashan do not have their own land but rent land from the government to farm because the area is state land and aboriginal reserved land which are not allowed for sale. They cannot use the lease as collateral to secure a loan.

family. Several villagers indicated that recently the middlemen have lowered the price of wasabi and they have not tended the field for a while (Interviewee CA007, 2005)

Betel harvesting

A few Han households own betel plantations. Similar to tea and coffee, betel is a long-term crop but it needs much less labour and can be harvested four times a year. In recent years, the market price of betel has dropped and most of the households do not want to invest more time, money and labour on the plantations. In consequence, they lease out their betel plantations to middlemen. In this way, they do not need to worry about extra processing of betel and marketing it (Interviewee CB005, 2005). The contract prices depend on the period and the size of the area rented.

3) Reciprocal Exchange

Reciprocal exchange and barter used to be crucial in the Cou tribe to obtain daily necessities. Even though nowadays food can be purchased easily, exchange of vegetables and fruits with family members or neighbours, intra-village and inter-villages, is still common. The custom has multiple benefits. For example, the market prices of grain, seeds and sprouts are expensive (Interviewee CD009, 2005). Exchanging them for assistance in planting reduces farming cost. The custom also helps with the supply of ingredients used in restaurants, food stalls and eateries.

4) Surplus Crops are Used to Feed Livestock

Surplus crops, damaged fruits and crops with unexpectedly low market prices are used to feed livestock or are not harvested.

5) Orchards Become a Tourist Attraction

As indicated earlier, most Chashan inhabitants used to plant a large number of plums, but when the income from the harvest cannot meet the cost, the field may be left untended. Some households that run homestays obtain full occupancy during April and May because they use orchards as an attraction and let tourists pick plums (Interviewee CD015, 2005). If the activity is in packaged tours, pick-your-own-fruit is free; if not, cash is always charged based on the weight of the picked fruit.

Livestock

Benefits

Subsistence Food and Cash Income

Similar to Shanmei, almost every household in Chashan raises chickens but a declining number of households raises pigs because they need a lot of feed and space, and their excrement is large in quantity. Since Alishan Township is located in the protected headwater area of the Tzengwen Reservoir, raising pigs on a large scale is forbidden because it produces a large amount of wastewater (informal conversation, 2004). At present, however, a few households raise wild boars and a substantial number of pigs free-range. A wild boar takes a longer time to grow than general pigs (Interviewees CD009, 2005). Villagers own pigs and chickens for different purposes. Pigs and chickens are for self-consumption and are also sold to generate cash. A small proportion of pigs and chickens is used to supply tourism enterprises, such as homestays /guesthouses, food stalls and tourists. The demand is all year round. The sale of roasted wild boars needs a special order with a higher price than ordinary pigs (large: over NT\$10,000 (CAD\$ 400/boar); small: about NT\$ 6,000 (CAD\$ 240/boar) because it takes time and skills to catch them (Interviewee CE022, 2005). Villagers purchase chicks to raise from the food truck that arrives from Jiayi City every morning or from the market in the city directly. The input is wild plants mixed with purchased oatmeal and household labour. Pigs are raised for multiple purposes including food, as well as an input to social and cultural activities. A whole pig is usually purchased for ceremonies and important events when a number of people are invited, such as for weddings and visits of guests. A pig is usually too big for a household to consume; therefore, when an owner decides to butcher a pig, they usually inform the entire village that pork is for sale.

Hunting

Similar to Shanmei, a team of hunters in Chashan often uses a group of hunting dogs to hunt. This form of hunting has been passed on from collective hunting on a larger scale in the past. Hunting alone with rifles, knives and a trap is also common. Very few males of the younger generation have developed the knowledge of hunting taboos and norms from their grandparents and parents as the majority of them left the villages for education at a young age. Male hunters who have recently returned to the village tend to travel a short distance for

hunting and drive instead of walking (Interviewee CE002, 2004). In the past, hunting was done for food. A hunter had a specific target game in mind before a hunting trip. If the target prey did not appear, he would return empty. At present, young hunters tend to shoot whatever they see on their hunting expeditions, because hunted prey are sold and, therefore, demand is unlimited (Interviewee CE002, 2004). Species listed for conservation were seen by the researcher in refrigerators on several occasions. Several hunters, however, indicated that some list species still exist in large quantities. For example, it was suggested that the population of Formosan Rock-monkey, a species on the list of wildlife requiring conservation, is actually too high to require protection. Many hunters in Shanmei and Chashan joked that the population of the Cou tribe is much smaller than the population of the Formosa Rock-monkey (Cou population: about 6,000; Formosan Rock-monkey: over 20,000). If the monkeys need to be protected, then the Cou tribe should be better protected! This raises several interesting questions. What sources of information are most reliable, based on what standards, and from whose perspective? Given that local indigenous people have high familiarity with the local environment while scientific research might be conducted in certain areas and at specific times of the year, the results of the latter might not be sufficiently comprehensive to represent the entire Taiwanese situation. On the other hand, as hunting has not been essential training for young Cou males since the Japanese colonial period, the traditional environmental knowledge of the Cou has not been fully transmitted to the younger generations. The legitimacy of information on wildlife for hunting needs further examination.

To revitalize Cou hunting culture, every year the Presbyterian Churches in Chashan, Shanmei and Xinmei hold a collective hunting camp. Experienced hunters take the younger generation to the hunting areas used in the past and teach them how to survive in the wilderness and develop their tracking and hunting skills.

Benefits

1) Subsistence Food and Cash Income

Hunting is no longer essential training nor an important livelihood activity for Cou males, but certain young to middle-aged individuals still go hunting during their spare time for personal interest and for cash earning. Game includes wild boars, monkeys, hair-foot flying squirrels, regular squirrels, owls, Formosan Reeve's muntjacs (vegetarian barking deer), Mikado pheasants, Formosan serow, etc. The game is for self-consumption or is sold to individuals,

markets outside the village, and homestays/guesthouses if tourists have special orders. The profit is lucrative and can be earned in a short time. One Formosan serow can be sold for NT\$ 5000-8000 (CAD\$ 200-320) (Interviewee CA004, 2005). This provides income for several households.

Disadvantages

The chairman (Han people) of the Leisure Agricultural Area commented that there is a big conflict between conservation and hunting as a livelihood activity (for cash). Conservation cannot feed the majority of villagers. Conservation only benefits a few households who run homestays because their customers like to see and catch fish and shrimps in the river and go bird watching.

Harvesting of trees, plants, and mountain resources

Benefits

1) Subsistence Food and Cash Income

Products gathered for self-consumption include honey, medicinal plants, rattan, jelly figs, a variety of bamboos, and a variety of seasonal wild vegetables. The mountain resources, such as honey, fruits, wild vegetables, and medical plants, are collected and sold for cash. Medicinal plants are sold to Chinese medicine stores (Interviewee CA007, 2005); other resources are sold to other villagers, homestays /guesthouses and their restaurants, and local eateries.

Freshwater fishing

Fish and shrimp caught in or near Chashan are for self-consumption and for sale to neighbours. In addition to a few traditional ways of fishing, hook and line, and net fishing are also common. Many outsiders and a few villagers still use electrocution and poison as means for acquiring fish. These ways wipe out virtually all the fish in a stretch of the river and it requires months, if not years, to recover. Poison results in the indiscriminate killing of all fish in the river, including the fish that have not yet reached maturity nor had offspring. Electrocution results in irreversible changes of the fish's body structure and may result in abnormal reproduction or loss of ability to reproduce. In recent years, fishing with poison has been reduced because most villagers have resisted the behaviour of outsiders.

River shrimps and fish are used as dishes with added value and are provided to guests in homestays. Shrimp catching is one common activity of packaged tours. Homestay hosts teach their guests how to use small nets to catch shrimps. A villager cadre suggested that the impact of this way to catch shrimps is minimal because the reproduction of shrimps is fast.

Wage employment, migration and cash remittances

Regular cash income

Permanent Jobs in the Alishan Area and Retail Businesses

As indicated in Table 6-5, among the 288 Chashan residents who reside in the village and have the ability to work, only 7.6% (n=22) have regular jobs with paying wages. Some of them are civil servants including staff of Alishan Township Administration; others work in Alishan Hotel and Jiayi Christian Hospital. Inside the village, Chashan Public School and nursery hires 14 people including a principle, several teachers, one officer, and two other workers. One nurse works in Chashan Clinic. A village head and a village affairs officer work in Chashan Village Administration. Chashan has three grocery stores, two food stalls that provide breakfast, and four eateries that provide simple meals.

Wage employment (casual labour)

Almost two fifths of villagers with work ability (38.5%) are engaged in casual labour periodically. The benefits of conducting casual labour have been described in the previous chapter.

Picking Tea Leaves, Weeding, Carrying Fertilizer

Similar to Shanmei, picking tea leaves, weeding and carrying fertilizer in tea plantations are common casual labour in the Alishan area. The majority of tea plantations are owned by Han people. The plantations are distributed in the high altitude areas of Alishan and Samin Counties. Tea-leaf picking can be required up to four times each year, depending on the weather (Interviewees CA002, CD006, 2005). Usually females are engaged in tea-leaf picking while males are drivers who carry the labourers. Weeding and planting flowers along the highways in the Alishan area are also common short-term employment opportunities. As described in the previous chapter, these projects offered by the Directorate General of Highways are open for bidding. Foremen (usually Han people with cash for bidding) who win the bids will contact Chashan villagers. The wage is usually over \$NT 1500-2000 (\$CAD 60-

80)/day (Interviewee CE012, 2005). Weeding and carrying fertilizer have high labour demands.

Making Tea

Making tea requires skills. The wage depends on the amount of tea made, sometimes NT\$ 2000-3000 (CAD\$80-120)/day or NT\$ 1000 (CAD\$40)/day (informal conversation, 2005).

Other Agriculture-related Jobs

Some villages work in orchards in nearby towns, such as in harvesting and packaging papayas. The wage is NT\$ 1000 (CAD\$ 40)/day and sometimes lunch is provided.

Construction, Building Houses and Indoor Decoration

As described in the previous chapter, projects often occur in the Alishan area, such as road repairs and building retaining walls and silt arresters. These projects create casual labour, such as operating excavators (up to NT\$ 4000 (CAD\$ 160/day) (Interviewee CD006, 2005) and making concrete forms. Private businesses and households need labour for building houses and indoor decoration.

Dancing

The Cea-ya-ma band is made up of a group of adults who are members of the Presbyterian Church and like to sing and dance. Under the guidance of CA001, the previous village head, and a church elder, they gradually developed their own style. Later, the officials of Jiayi County Government found that their performance was special and started to bring people to Chashan to listen. The group began to accept invitations (mostly from government organizations) for performances and went to different regions to perform traditional Cou dances. The performances are mostly voluntary and the purpose is to market Chashan as a tourism destination and its agricultural products (informal conversation, 2004, 2005). Two albums were produced after they became famous. As increasing number of tourists come to Chashan during the weekends and the band performs at the campfire party that is usually held on Saturday nights for tourists to experience local hospitality. The performance is usually voluntary because the members regard it as devotion to the church. About 2-3 years ago, after a performance in a city, several members were injured on their way home in a car accident and one member lost his life. The band, therefore, disbanded and has not performed on Saturday night as often as before. In 2004, Jiayi Farm, a resort located 45 minute drive away from Chashan, asked a few members of the band to perform in the resort as an attraction.

About 7-8 members signed a contract with the resort to perform in the place every day, with two performances on weekdays and three performances on weekends. The contract period was one year and they renewed the contract in 2005. The wage is \$25000 (CAD\$ 1000)/month/person (informal conversation, 2005). One tenth of the salary of each person is given to the community development association as development funds (Interviewee CD011, 2005). Several members indicated that the jobs are less time and labour demanding and the wage is better than some of the casual labour (Interviewees CD003, CD011, CE010, 2005).

Staff of the Cou Culture and Arts Foundation

As described in the previous chapter, the aim of the foundation is to collect, study and revitalize Cou clan culture, and to promote cultural exchange and communication. Currently, 10 Cou commissioners contract with the foundation and two of them are Chashan residents (Interviewees CA009, CA010, 2004, 2005)

Substitute Teaching

As described in the previous chapter, in recent years, the Ministry of Education has subsidized the cost of teaching personnel in all counties and cities in an attempt to solve the problem of insufficient manpower in public schools, to improve teaching quality, and to encourage plural education. Several villagers are asked to teach their mother tongue (Cou language), arts, English and sports in public schools in the Alishan area. The wage is calculated by the hour. At present, five villagers work as substitute teachers in the Chashan public school. The Presbyterian Church in Chashan applied for subsidy (for half a year) to hire a few female villagers as tutors to help public school students with their homework. The wage is NT\$ 7000 (CAD\$ 280)/month (Interviewee CE010, 2005).

Migration

As indicated in Table 6-5, among the 288 villagers with work ability, one third (33%) of them make a living outside the village (29.2% of them have cash earnings while the remaining 3.8% do not). Over one fourth of migrated residents work as factory labourers, followed by running little businesses, such as eateries, a hairdresser and karaoke. The rest are truck drivers, construction workers, domestic workers and tea producers (Interviewee CA012, 2005).

As described in the previous chapter, the Directorate General of Highways also provides casual labour, such as roadside weeding and highway maintenance. These projects are distributed across the entire island and are open for bidding. Foremen (usually Han people)

who win the bids will contact Chashan villagers and ask whether or not they want to do the jobs. The contract period is usually one year and the number of weeding times is 8-12 per year. The wage ranges from NT\$1500-3000 (CAD\$ 60-120)/day, depending on the number of workers and the area of weeding (Interviewee CE012, 2005).

6.7.3 Livelihood Activities Indirectly Related to Tourism

Wage employment (casual labour)

Maintaining and beautifying the environment

As described in the previous chapter, in the past 2-3 years, Alishan National Scenic Area Administration and Alishan Township Administration have provided short-term, supplementary employment opportunity in public services for the unemployed. Job holders work twenty-two days per month for six months and are then replaced by another group of applicants. Before there were over 20 quotas and currently there are only eight available. The tasks are to clean and beautify the environment, especially in scenic spots, and to cut the grass along No. 129 County Highway, which connects Shanmei, Xinmei and Chashan (informal conversation, 2004, 2005)

Both administrations have different projects in the Alishan area for open bidding. Usually lowland Han people have the financial capital to win the projects. They will then contact village cadre as foremen to find villagers to do the project jobs, such as planting tea flowers and building fences in Chashan. The wage is NT\$1500 (CAD\$ 60)/day .

Starting in 2005, the Council of Labour Affairs, Executive Yuan has promoted a “Scheme in Plural Employment”. One of the goals is to reduce the unemployment rate of aboriginal people who are the priority of targets of the scheme. A certain quota is reserved for aboriginal people. Chashan Community Development Association applied to the program for a subsidy for 21 villagers. The offered quota for subsidy was for 15 people for the year of 2006. The program stipulates that a subsidized person should work over 20 hours per week for a maximum of 22 days per month. The wage differs, ranging from NT\$ 800-1000 (CAD\$ 32-40)/day, depending on job type including pavilion repair, maintenance of trails and old paths, and river protection (Interviewee CA013, 2005).

Construction and carpentry

Because of the flourishing development of the tourism industry in Alishan, Cou people are increasingly motivated to be engaged in tourism enterprises, such as running homestays or guest houses. Without much cash, the majority of them usually cannot afford the high prices of building materials and manpower in the lowland and are unwilling to take on the risk of a large loan. Through introductions of friends or relatives, they usually ask local Cou (in the seven Cou villages) who specialize in carpentry and construction to carry out the tasks, such as building guest houses, traditional Cou buildings and pavilions. The person who is in charge of the tasks usually finds his co-workers (3-5 people) in his own village. Mostly local building materials are used to reduce costs.

Casual cash earnings

Artistic work and maintenance of pavilions

Chashan is a tribal park. Every wooden carving on the streets, in front of a house, or in a pavilion has a fascinating story. Visitors also can see works of art made of metal and stone dispersed throughout the village. Two young artistic workers are paid by government or villagers to create these works. Sometimes they take orders from other Cou and indigenous villages to produce artistic works. Individuals also earn cash from the government by maintaining pavilions, such as by changing the thatch on the roof.

6.7.4 Livelihood Activities in Tourism

Introduction

Similar to Shanmei, an increasing number of visitors has been coming to Chashan in the past several years. Tourism-related businesses, homestays in particular, are slowly growing in Chashan, based on Alishan Mountain scenery, the Danayigu Ecological Park in Shanmei, and festivals that relate to Cou culture. Tourism-related livelihood activities are usually concentrated on weekends and holidays. The number of visitors is about 150-250/day (Interviewee CA001, 2004). The occupancy rate during weekends can reach up to 80-90% during the non-typhoon season.

Opportunities to participate in tourism are distributed very unevenly across Chashan. The main area of concentration is around the intersection of Jiayi Local Road 129 and two

routes connected to National Highway 3³ and to Sanmin Township, Kaohsiung. Within the community, those with strong financial capital, belonging to certain affiliations, and relevant skills, such as having a strong connection with outside groups and marketing abilities, have more opportunities.

Individually-run enterprises: guest houses and homestays

According to the fieldwork, in 2004 and 2005 there were 13 individually-run guest houses and homestays in Chashan (Table 6-6). Up to 15% (n=42) of Chashan villagers with work ability are directly and indirectly engaged in the businesses periodically.

³ The route connecting Chashan and National Highway 3 is the major route which villagers take to Jiayi. The area along the route is geologically fragile. Each time a typhoon comes, the route is severely damaged and a large amount of labour is required to repair it. Even though the government (Alishan National Scenic Area Administration in particular) has proposed several times to widen it, mainly to bring in more tourists, the proposal has been refused by community cadre, considering the great effects on the environment, insisting that recreational undertakings should be small in scale and grow slowly. But some villagers object to the assertion and believe that widening the path to a road can not only secure villagers' lives but also enable tour buses to drive in, promoting Chashan's rapid development. The issue of road construction has been a big issue in Chashan.

Table 6-6: Guest Houses and Homestays in Chashan

Guest houses/ Homestays	Max Cap.	Staff (No. of people)	Cash Income			Note
			No. of Rooms and Meals	Services	Others	
Bo-yu-ya-na (Cou guest house in unit 1)	30	Family members and relatives (up to 6)	1) 5 rooms (\$ 1200- 2000/room) ^c 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes)	1) Package tours NT\$ 1500 (2 days 1 night, 3 meals included, activities include sight seeing, catching shrimps, Cou style of pestling rice, Gu fish watching, interpretation).	1) Self- processed agricultural products for sale (e.g., bamboo shoots, candied plums)	1) Vegetable: local seasonal supply; meat: local & outside supply; river shrimp and fish: local supply
Yamiyana garden (Cou guest houses in unit 1)	32	Family members (up to 4)	1) 6 rooms (\$ 2500/room); Adult \$ 500, Child \$ 400 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes)	1) Package tours NT\$ 1600-1800 (2 days 1 night, 3 meals included, activities include catching shrimps, campfire party, Cou style of pestling rice, Gu fish watching, interpretation). 2) Karaoke 3) Alcohol	1) Self- processed agricultural products for sale (e.g., bamboo shoot, millet wine).	1) Has loan 2) Vegetable: local seasonal supply; meat: mainly outside supply; river shrimp and fish: outside & local supply 3) Wooden houses (high cost for construction) 5) Tour type: FIT ^a
Min-yueh (Cou guest house in unit 3)	20	Family members and friends (up to 3)	1) 6 rooms (\$ 1200- 2000/room)			Tour type: FIT ^a
Luh-doen (Bunun guest house in unit 3)	25	Family members (up to 2)	1) 5 rooms (\$ 1200- 1800/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Bunun dishes)	1) Package tours NT\$ 1600-1800 (2 days 1 night, 3 meals included, activities include pestling rice, catching shrimps, interpretation of Chashan natural and cultural ecology, rod fishing, river tracing, swimming). 2) BBQ area, campground, tea tasting area & parking lot	1) Interpretati on \$1500/time 2) Car rental \$1000/car 3) Camping \$200/adult; \$100/child 4) Photograph in Cou cloth \$100/perso n	Tour type: FIT

(Table continues)

Table 6-6: Guest houses and Homestays in Chashan (continued)

Guest houses/ Homestays	Max Cap.	Staff (No. of people)	Cash Income			Note
			No. of Room & Meals	Services	Others	
Chiayama Villa (Cou guest houses & restaurant in unit 3)	90	Family members & Chashan residents (regular: 5; casual labour: depends on business)	1) 22 rooms (\$ 1200- 2000/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes)	1) Package tours \$ 700 (half a day with lunch); \$ 1600-1800 (2 days 1 night, 3 meals included, activities include natural slide on Dashih Cliff, pick your own crops, Cou style of pestling rice, catching shrimps, firefly watching, Gu fish feeding, river tracing, interpretation of Chashan natural and cultural ecology). 2) Karaoke 3) Parking lot	1) Self- processed agricultural products for sale (e.g., bamboo shoot).	1) Has loan (over \$10,000,000, mostly for guesthouse) 2) Former member of Strategic Alliance 3) Vegetable: local seasonal supply; meat: mainly outside supply; river shrimp and fish: outside & local supply 4) Tour type: GIT ^b & FIT 5) Has self website
Emo (Cou homestay in unit 3)	20	Family members (up to 1)	1) 5 rooms (\$ 1200- 2000/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes in Mother Tian)	1) Package tours \$ 1800 (2 days 1 night, 3 meals included, activities include Cou style of pestling rice, catching shrimps, campfire party, interpretation of Chashan natural and cultural ecology). 2) Café, tea tasting area & parking lot	1) Souvenirs (e.g., album), self- processed agricultural products for sale (e.g., mountain tea, camellia oil).	1) Has loan 2) The director of Strategic Alliance ^c 3) Business focus on weekend 4) Tour type: FIT
Paicu (Cou homestay in unit 4)	48	Family members (up to 1)	1) 11 rooms (\$ 1200- 1400/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes)	1) Activities include catching shrimps, fruit harvesting, interpretation of Chashan natural ecology). 2) BBQ area, tea tasting area & parking lot	1) Self- processed agricultural products for sale (e.g., mountain tea, bamboo shoots, plum vinegar).	1) Former member of Strategic Alliance 2) Vegetable: outside supply; meat: outside supply; river shrimp and fish: outside supply 3) Tour type: FIT

(Table continues)

Table 6-6: Guest houses and Homestays in Chashan (*continued*)

Guest houses/ Homestays	Max Cap.	Staff (No. of people)	Cash Income			Note
			No. of Room & Meals	Services	Others	
Jia-nan-mei-di (Bunun homestay in unit 4)	20	Family member s (up to 3)	1) 4 rooms (\$1400/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes in Mother Tian)	a) Package tours \$ 1800 (2 days 1 night, 3 meals included, activities include Cou style of pestling rice, catching shrimps, campfire party, interpretation of Chashan natural and cultural ecology). c) Tea tasting area & parking lot	1) Self-raised pigs for sale.	1) Member of Strategic Alliance 2) Tour type: FIT
Yakumagana (Cou homestay in unit 3)	24	Family member s (up to 2)	1) 4 rooms (\$1400/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes in Mother Tian)	a) Package tours \$ 1600 (2 days 1 night, 3 meals included, activities include Cou style of pestling rice, catching shrimps and field snails, campfire party, firefly watching, river tracing, natural slide on Dashih Cliff, interpretation of Chashan natural and cultural ecology). c) Tea tasting area & parking lot	1) Self- processed agricultural products for sale (e.g., yam, pumpkins, cabbage)	1) Has loan 2) Member of Strategic Alliance 3) Tour type: FIT
Jy-zai-tsy- shan-zhong (Han homestay and café in unit 3)	4	Close friend (up to 1)	1) 2 rooms (\$1500- 1800/room) 2) Breakfast included. Reservation required for lunch & dinner (general & traditional Cou dishes in Mother Tian)	1) Activities include handicraft DIY. 2) Arts studio, café, BBQ area & parking lot	1) Souvenirs for sale (self and other produced handicrafts) 2)Agricultural products of the farmer's association and others put up for sale	1) Has loan (partially for homestays) 2) Member of Strategic Alliances 3) Tour type: FIT 4) Vegetable: local supply; meat: outside supply

(Table continues)

Table 6-6: Guest houses and Homestays in Chashan (continued)

Guest houses/ Homestays	Max Cap.	Staff (No. of people)	Cash Income			Note
			No. of Room & Meals	Services	Others	
Kai-yuan Farm (Han guest houses in unit 4)	47	Family members and Chashan residents (up to 5)	1) 12 rooms (\$1800- 2700/roo m) 2) Breakfast included. Reservatio n required for lunch & dinner (general & traditional Cou dishes)	1) Package tours \$ 1500- 2100 (2 days 1 night, 3 meals included, activities include interpretation of flora and fauna & history of Chashan, frog searching, firefly watching, & shrimp catching, natural slide on Dashih Cliff, SPA in the river, Cou style of pestling rice, river tracing, cherry blossom watching, stalactite cave exploration 2) Tea tasting & BBQ area & parking lot	1)Agricultural products produced by self, others, and Farmers’ Association for sale (e.g., mountain tea, camellia oil, honey, wasabi, jelly fig, candied fruit).	1) Former member of Strategic Alliance 2) Tour type: GIT & FIT
Chashan no.95 (Han homestay and café in unit 4)	8	Family members and Chashan residents (up to 3)	1) 2 rooms (\$1800- 2400/roo m) 2) same as above	1) same as above 2) same as above + café	1) same as above	1) Has loan (over \$2,000,000, mostly for homestays) 2) Tour type: FIT
Chwen-yi- yuan (Han guest house homestay, and restaurant in unit 4)	48	Family members (up to 5)	1) 12 rooms (\$1600- 2800/roo m) 2) Breakfast included. Reservatio n required for lunch & dinner (general & traditional Cou dishes)	1) 4 types of package tours \$ 1500 (2 days 1 night, 3 meals included, activities include mountain hiking, interpretation of the history of Chashan, firefly watching & shrimp catching at night, Gu fish watching, natural slide on Dashih Cliff, Cou style of pestling rice, sight seeing). 2) Tea tasting area & parking lot	1) Self produced agricultural products for sale (e.g., medicated alcohol, Chinese medicine)	1) Has loan (for guesthouses \$2,500,000). 2) The only legal guest house in Chashan 3) Tour type: GIT & FIT 4) Vegetable: self produced & outside supply; meat: self produced & local supply; river shrimp and fish: outside supply 5) Has self website

(Table continues)

Table 6-6: Guest houses and Homestays in Chashan (*continued*)

Café & Eatery	Staff (No. of people)	Cash Income			Note
		Meals	Services	Others	
Mother Tian	Presbyterian Church members (up to 5)	Traditional Cou dishes \$2000-3000/table (10 dishes) Regular dishes \$1200-1600/table	For members of the Strategic Alliance. Reservation required for 3 meals including general & traditional Cou dishes	1) Local agricultural products for sale	1) Vegetable: local supply of the season; meat: local & outside supply; river shrimp and fish: local & outside supply
Chashan Eatery	Family member (up to 2)		Meals. Reservation required for large groups		1) Has loan (for the eatery) Vegetable: local & outside supply; meat and seafood: local & outside supply
Fishers' Place	Presbyterian Church members (up to 3)		Simple meals, coffee, and tea		1) Church run business 2) 30% of income is personnel cost, the rest belong to the church

Note. ^a FIT refers to full independent tour. ^b GIT refers to group inclusive tour. ^c Currency rate: CAD\$1= NT\$25
Based on fieldwork in 2004 and 2005

The guest houses and homestay businesses are regarded as a sideline in Chashan because the amount of income and time spent are not stable. Reasons for becoming involved in the business vary, but the majority of the households indicated that cash earnings are not the main reason. Table 6-7 lists reasons for becoming involved in the business of homestays /guesthouses and/or for their expansion.

Table 6-7: Reasons for Becoming Involved in Homestays /guesthouses and/or Their Expansion

<p>1. Trends From a supply-side perspective, with the Taiwan economy shifting towards a service- and high-tech-based economy, the traditional agriculture, forestry and fishery industries have all been in decline. Furthermore, the rise in agricultural imports as a result of Taiwan joining the World Trade Organization (WTO) has forced many farmers to look for a second income. Promoting leisure agricultural industry is necessary.</p>
<p>2. Create livelihood opportunities for the next generation The younger generation who obtains their education in cities are no longer familiar with mountain work: such as farming, hunting and harvesting. Villagers in Both Shanmei and Chashan who run homestays and/or guesthouses stated that one major reason for them to borrow money or secure a loan to invest on the business is that limited job opportunities are available in the mountains and the majority of the young generation has not developed the skills required to survive in mountains. The building of homestays /guesthouses and accompanying basic infrastructure are physical and economic capital that can be passed on to the next generation to provide them with another livelihood option and cash-earning opportunities.</p>
<p>3. Well-being enhancement The majority of villagers consider tourism is a way of development. Several of them indicated that prerequisites of making the business successful are to improve and beautify the surrounding environment and to treat guests as friends. Meeting visitors expectations through enhancing the quality of accommodation and services can go side by side with the goals of the improving living standards, having good relations with others, friendship, creativity, fulfillment and fun. For example, several female homestay proprietors stated that they like gardening. The business provides inspiration and motivation to learn about plants. A good selection of flowers enables the place to be surrounded by flowers in all seasons of the year.</p>
<p>4. Create opportunities for earning cash and provide an example to other villagers The previous village head (CA001) in Chashan who has good relations with many scholars and NGOs is not short of guests for her homestays. She often distributes her guests to other homestays. She runs homestays to provide examples to other villagers and to create cash earning opportunities for those who do not have extra rooms and funds to construct homestays and guesthouse. For example, business is created for Mother Tian restaurant.</p>
<p>5. Less labour demanding Several villagers who are directly and indirectly involved in the business stated that it can be done for a long time with few restrictions of age and physical ability.</p>

(Table continues)

Table 6-7: Reasons for Becoming Involved in Homestays /guesthouses and/or Their Expansion (continued)

<p>6. Like to make friends Almost all proprietors stated that making friends is one main reason to run the business. It is enjoyable to make friends with similar interests and tastes. Friends with different backgrounds provide opportunities to learn new things and exchange knowledge. Their opinions and suggestions help to improve the quality of accommodations and services. They introduce more friends to come and increase the business of homestays and sales of local specialties. Some households' friends even establish websites to promote the homestays for the hosts. As one female homestay proprietor stated: <i>"It is satisfying to see friends enjoy the food I prepare. The way of sustainable development is to treat my friends well and make them happy"</i>.</p>
<p>7. Attend to needs of visitors and friends As an increasing number of visitors and friends come to the villages, so the demand for accommodation increases.</p>
<p>8. Cash earnings Earning cash is the main purpose for a few households that have secured large loans to run lodges on a relatively large scale.</p>
<p>9. Like to be involved in the leisure industry A few households indicated that the business is not only to provide accommodations but also to share or explore fun things with friends. As several homestay proprietors stated, there are several ways to enrich guests' experiences and share our appreciation for our lovely homeland with our friends, such as to develop various outdoor activities (e.g., white water rafting; frogs, fireflies, and birds watching) and to share the local natural and cultural environment. The chairman of the Leisure Agricultural Area was involved in research on frogs in Chashan and he hopes that the results of the research can be used in his interpretation of local ecology for customers in homestays.</p>

From Interviewees CA001, CA002, CA003, CA004, CA011, CA012, CB001, CB004, CB005, CC004, CD002, CD005, CD006, CD007, CD009, CD013 (2004, 2005)

The amount of cash earned by each homestays varies, depending on prices of rooms, activities and services provided. Out of 13 households, only one has its main source of income from this business. Table 6-8 lists the main sources of income of the households running homestays/guesthouses.

Table 6-8: Main Sources of Income of the Households Running Homestays/Guesthouses in Chashan

Guest houses/Homestays with café	Main Sources of Income
Bo-yu-ya-na (Cou guest house in unit 1)	Odd job & farming
Yamiyana garden (Cou guest houses in unit 1)	Sales of arms & grocery store.
Min-yueh (Cou guest house in unit 3)	Regular wage (civil servants: village head & nurse)
Luh-doen (Bunun guest house in unit 3)	Regular wage (civil servants: village affairs officer & director of Chashan Public School)
Chiayama Villa (Cou guest houses & restaurant in unit 3)	Guest houses
Emo (Cou homestay in unit 3)	Regular wage (preacher & social worker) and farming
Paicu (Cou homestay in unit 4)	Tea & agriculture & regular wage (people's representative of Alishan township)
Jia-nan-mei-di (Bunun homestay in unit 4)	Livestock & regular wage (public school teacher)
Yakumagana (Cou homestay in unit 3)	Combination of agriculture & homestays
Jy-zai-tsy-shan-zhong (Han homestay and café in unit 3)	Combination of substitute teaching, handicrafts, homestays and café.
Kai-yuan Farm (Han guest houses in unit 4)	Tea & agriculture & regular wage (public school teacher)
Chashan no.95 (Han homestay and café in unit 4)	Tea & agriculture
Chwen-yi-yuan (Han guest house homestay, and restaurant in unit 4)	Betel field & agriculture

From Interviewees CA001, CA002, CA003, CA004, CA011, CA012, CB001, CB004, CB005, CC004, CD002, CD005, CD006, CD007, CD009, CD013 (2004, 2005)

Cost

Homestays strive to provide “experiences”. The idea of homestays⁴ is having visitors stay in the surplus rooms of a household to experience local daily life, spend time with the host and share meals with the family (Interviewee CA002, 2005). This host-oriented style is different from the majority of the arrangements of tourist-oriented itineraries. A homestay proprietor is supposed to combine the business with his or her daily life and work. For example, during the harvest season of bamboo shoots, guests of homestays can be invited to observe or even participate in the harvesting process (Interviewee, CA002, 2005). The idea, however, has not been fully implemented in Chashan. When marketing homestays in Chashan, instead of promoting “experiencing a different lifestyle”, the village has been considered as a substitute

⁴ Regulations clearly express that guesthouses are managed as household sideline production. Guest rooms are limited to five except for those on recreational farms, in tourist areas, remote areas or on subsidiary islands which are delimited by agricultural executives and the rooms are limited to 15 (Lee and Huang, n.d.).

for a hotel, especially when tourists travel to the famous Alishan areas and are unable to reserve well-equipped rooms in time (Interviewee CA002, 2005). Most tourists have not been “educated” on what homestays in Chashan should be and they usually have unrealistic expectations of homestays. From the perspective of city residents, the condition of accommodations of several homestays in Chashan is simple and crude. Without further furnishing and reconstruction, the condition of the rooms, meals provided, and activities involved often cannot meet the expectations of visitors. For example, most houses in the village have their only toilet outside the rooms. Some homestays only provide shared rooms (capacity 5-8 people) to visitors and sometimes the arrangement is made to have different groups stay in one room. These have made visitors feel uncomfortable and inconvenienced them. Most visitors would rather spend more money to stay in a better-equipped room (Interviewee CA003, 2004). Consequently, households with successful homestay business are those with regular income from permanent employment or other industries, such as agriculture. To meet visitors’ expectation, the income has been invested in the construction of guesthouses on their own land or in the improvement of the accommodation, on the establishment of a website for advertisement, and on hiring other villagers to provide services (e.g., interpretation, cooking, serving, renting trucks for sightseeing) for packaged tours. Packaged tours are designed to meet the expectations of a different type of tour group (Interviewee, CA002, 2005). The arrangements undermine the original spirit of homestays.

Most households in the village do not have funds or land to invest in such improvements. Besides, visitors are concentrated on weekends and most households wonder whether it is beneficial to secure a loan for such an investment, wondering if they will be able to recoup their investment. This is the first reason why most households in Chashan hesitate to become involved in the business (Interviewees CA002, CE018, CE017, 2005; informal conversation, 2004, 2005). Second, running the business, especially packaged tours (a tourist-oriented arrangement), needs great family support and help from other villagers, such as in spending time with visitors, preparing meals and snack food, and taking visitors for sightseeing. If a household lacks labour and required assets, such a business is not an option. Third, Cou people in general are introverts and show less enthusiasm to unacquainted people. Lack of contacts (e.g., travel agents) for the marketing of Chashan and individual establishments and the skills required to interact with tourists has prohibited some Cou and

Han households from becoming involved in the business. Fourth, time, labour, and cash are needed to learn and plan, and most households, even those with surplus rooms for guests, need cash urgently and cannot risk such investments. As Chashan becomes better known and the number of return visitors increases, for homestays with better equipped rooms and more varied activities, the sources of regular visitors are growing whereas this is not the case for business with less equipped rooms. The homestay business in Chashan does not make significant contribution to the livelihoods of the poorest people. Tourist-oriented arrangements and the homestay business have not been fully incorporated into local lives and work.

Benefits

1) Cash

Cash comes from charges for accommodation, food and beverages, packaged tours, services, and sales of local specialties including agricultural products and some handicrafts (Table 6-9). The prices charged for homestays are fixed, unlike the prices of agricultural products that fluctuate with market price so that sometimes the income cannot even meet the costs.

Table 6-9: Sources of Tourism Income from Homestays/Guesthouses

Income from homestays/guesthouses (accommodation & meals & café)
Cash from casual labour in homestays/guesthouses
Collective-run enterprise: a restaurant (Mother Tian) and an eatery
Individual-run enterprise: an eatery, food stalls, and a craft store
Sales of package tours
Teaching craft DIY (do it yourself) in a studio
Crafts sales to tourists
Sales of local agricultural products and specialties to tourist homestays/guesthouses, eateries, and restaurants
Temporary employment for guesthouses and pavilion construction
Fees charged for parking and use of the campground (barbeque, cleaning, fish feed)

Compared with other cash-earning opportunities, such as retail businesses and casual labour, the unit prices of a room or a package tour are more lucrative even though the total amount per establishment varies, depending on the number of rooms and visitors (Interviewees CD007, CD009, 2005). Tea and camellia oil production need advance investment to pay for labour and to support the livelihood before the products are produced and sold (Interviewees CD006, CD007, 2005). Moreover, homestays can make a relatively large amount of cash in a short period of time. For households that lack young and middle-

age labour, or with disabled and/or many children, the cash helps with children's tuition fees, daily necessities, and to pay back loans (Interviewees CD005, CD009, CD015, 2005) .

2) Creating Cash-earning Opportunities, Maintaining Raw Material Supply, and Stimulating Crop Production

Guesthouses on a relatively large scale need a large parking lot for tour buses. A household can provide its land as a parking lot and obtain cash based on the number of cars from the guesthouses. Households that run homestays and provide package tours usually pay family members or relatives for help with serving tourists, such as for renting trucks to take tourists sightseeing, cooking, BBQ, and cleaning rooms. The households that provide package tours with activities of Gu fish watching, barbeque, and playing with water, pay fees for use and cleaning of the campground to a household that raises Gu fish and a household with a campground. Sometimes homestay proprietors introduce their customers to restaurants and eateries in Chashan (Interviewees CA001, CA003, CD015, 2005; informal conversation, 2005)). During the seasons of tea harvesting and production, if the homestay business is busy, the proprietors usually ask their relatives or friends to carry out the job of tea production and weeding and pay them later (Interviewees CD006, CD007, 2005). This also creates another cash-earning opportunity to others.

Meals provided to tourists are of two kinds: the general menu and the Cou-style menu. The former is cheaper and most of ingredients used are purchased from outside. The latter is more expensive because it uses local ingredients, wild and organic. A small proportion of different ingredients comes from different households in Chashan and nearby Cou villages (e.g., Xinmei) (informal conversation, 2004, 2005). Using locally produced crops maintains raw material supply, offers additional opportunities for cash earnings, and indirectly stimulates crop production. The cost of the ingredients purchased from other Cou households in the mountains is usually higher than in the cities because the cost of labour is high and the quantity produced is smaller. A large proportion of ingredients used in the homestays and guesthouses on a large scale come from nearby towns and cities due to the following reasons. First, the prices are lower; second, the quantity of local supply is not enough; third, the outside supply is more stable and convenient. For example, chicken and meat are already cleaned and packaged, unlike those purchased in the mountains that still need time and labour to butcher and clean (Interviewees CD012, 2005).

A few villagers who raise boars on a large scale obtain cash by selling roasted boars (NT\$ 6000 (CAD\$ 240)/boar) to tourists or homestays (Interviewees CA004, CE022, 2005). Households that cultivate vegetables obtain cash by supplying their products to homestays/guesthouses.

When homestays/guesthouses are full, hosts usually refer additional visitors to other homestays. The cooperative rather than competitive relationship retains more business in Chashan.

3) Provide Another Livelihood Option

Several female villagers indicated that, compared with farming, the tasks of running homestays, such as cleaning rooms and washing sheets, are less labour-demanding and do not result in sunburn as agricultural activities (Interviewees CD009, CD012, CD013, 2005).

4) Develop Different Skills

Running the business stimulates female villagers to learn to cook and develop new dishes, which usually interests them. At present, there are 23 cookery certifications in the village. Several villagers also indicated that they enjoy running the business because, compared with other industries, they can make many different kinds of friends. It is very important to make visitors feel at home, so they will return (Interviewees CA004, CD005, CD007, CD013, 2005). Several benefits gained from running the business including technical skills, such as cost control and the use of computers; interaction skills, such as how to deal with different types of visitors; information exchange, for example, learning from customers that a website is a good selling channel (Interviewee CA002, CA004, 2005); and creating motivation to learn more about the local environment to share with friends (Interviewee CA002, 2005).

5) Create Markets and Sales Channels

Lack of markets and sales channels to sell local crops and agricultural products is one main reason why local farmers are exploited by middlemen (wholesalers). This has reduced the reliability of agriculture as a livelihood activity in terms of cash earnings. The homestay business creates markets to sell self and other produced agricultural and mountain products to tourists, such as mountain tea, bamboo shoots, camellia oil, millet wine, candied plums, ginger cane sugar, yam, and pumpkins, depending on the season. The benefits are two-fold. First, the use of the farmlands of households that run homestays has gradually shifted to the production of more kinds of crops in smaller quantities. This does not overuse the farmland.

Less pesticide is used to produce organic vegetables for tourists. Several female villagers indicated that they need more assistance on how to produce organic crops (e.g., How to use organic fertilizer? The season for fast-growing vegetables?) (Interviewees CD001, CD003, CD009, 2005). Second, sales channels have been gradually established for local agricultural products with high quality through word of mouth. The products can be ordered and delivered through couriers (Interviewee CA002, 2005). This potentially promotes the sustainable development of local agriculture.

Promotion of local specialties and hosts' hospitality by tourists' word of mouth is often more effective than formal forms of advertising and marketing. After experiencing local accommodation and food, tourists and their friends often order local products for special delivery all over the island (Interviewee CA002, 2005). Several homestay proprietors whose main source of income comes from agricultural products indicated that the cash earned from accommodation is rather trivial. However, the quantity of agricultural products sold and greatly increased sales channels have increased because clients have become repeat customers for both homestays and agricultural products (Interviewees CA002, CD006, 2005). Even though the demand for local agricultural products from homestays business is still small, it does expand sales channels for local farmers.

6) Blend in with and Supporting Multiple Livelihood Strategies

The business is concentrated on weekends. Compared with other livelihood activities, such as engaging in casual labour, households that run homestays have more time to conduct other economic activities during weekdays, such as farming (Interviewees CD005, CE004, 2005). Cash earned from the homestays business can be used to purchase seeds, sprouts and fertilizer (Interviewee CE004, 2005). The time arrangements for running homestays are very flexible. During the harvest season of bamboo shoots, households with small-scale homestays need labour to collect bamboo shoots. They stop providing the service of packaged tours which need more labour and only provide accommodations with a kitchen to tourists in small groups who bring their own food and cook by themselves (Interviewee CD015, 2005). Women with young children who are mainly engaged in domestic work can still make cash (e.g., sales of meals) during weekends and being at home allows them and their family members to look after children (Interviewees CD005, CD007, 2005). Case three demonstrates how tourism-related activities have blended into a household's livelihood activities.

Case 3: Managing the risk of tourism income through income diversification

CD005 is a 34-year-old Han female married to a Cou male. She was divorced in 2005 and at present raises alone two sons who are in Chashan public school. She used to teach art in kindergarten and worked in graphic design and interior design in Chiayi City.

Before the divorce, she and her husband secured a loan to build a house (Jy-zai-tsy-shan-zhong) in Chashan with three rooms on the second floor and a handicraft store, a studio, and a coffee bar on the main floor. Most of her weekday income comes from substitute teaching in Chashan Public School and making handicrafts. On weekends, she runs homestays; teaches handicraft DIY (do it yourself); and sells handicrafts, simple meals, tea and coffee. Because she is a member of the Strategic Alliance, sometimes she provides rooms and handicraft DIY as an activity in package tours.

She stated that during the rainy and typhoon season, no tourists come and the homestay, handicrafts store, and coffee bar business is down. She has to rely on substitute teaching. Recently she found a wholesaler willing to purchase most of her handicrafts to find sales channels throughout Taiwan. The majority of her income pays the loans on the house and household appliances. Daily necessities occupy only small proportion of her living expenses since the cost of living in the mountains is much less than in the cities.

She hires a local villager to help her with domestic work, such as cleaning rooms, washing dishes, and preparing simple meals and beverages, so she can have more time to produce handicrafts. Some local farmers sell their crops through her store.

She stated that it is her dream to have a studio and create artistic works (even produced in large quantity). She likes to run homestays because they allow her to make good friends with similar interests and tastes. The time arrangement for running homestays is very flexible. If more artistic creation needs to be done this week, she can decide not to have tourists this week. The labour demands of running homestays are much less compared to making handicrafts and preparing simple meals and beverages. Her multiple home businesses enable her to look after her children easily. She wants her children to have happy and simple childhoods, so she chose to stay in the mountains rather than in a city.

CD005's livelihood consists of multiple tourism and non-tourism activities. When tourism activities cannot support her, she has to rely on non-tourism activities.

From Interviewee CD0005 (2004, 2005)

7) Accumulation of Physical and Economic Capital and as Means for Production

Homestays serve multiple purposes. Accommodations can cater to tourists, friends and relatives or for self-use. Funds invested in building construction become physical and economic capital that can be passed on to the next generation for further production. Unlike other businesses, such as tea or camellia oil producing, funds and time invested in labour and processing cannot guarantee returns.

Disadvantages

Similar to Shanmei, a household that secured a large loan and invested in the construction of a villa and restaurant is in long-term debt. The majority of the income is used to pay off the loan. Natural and man-made disasters have had a huge impact on the business. Case 4 demonstrates a situation in which the household has invested all their tangible (e.g., loan) and intangible assets (e.g., family support) to sustain their tourism enterprise.

Case 4: Using tangible and intangible assets to sustain tourism enterprises

CA003 is a 35 year old Cou male, the owner of Chiayama Villa guesthouse and restaurant which is the largest tourism enterprise in Chashan. His family also runs a grocery store and an eatery serving simple meals and beverages. He used to make a living by doing casual labour in mountains.

He started a homestay business about 10 years ago. In the beginning, when his outside friends came to Chashan for a visit, CA003 showed them around and brought them to experience rural life and charged for some expenses. His friends introduced more people to come and there were not enough rooms to accommodate the increasing number of visitors. His friends encouraged him to build more rooms. He decided to borrow loans to expand his homestay business without any subsidies from the government and the community.

He and his wife's family continued to apply for loans and purchased two pieces of land and they built a guesthouse with 22 rooms and a restaurant, which can accommodate two tour buses. At one point, he had fights with his mother and sisters about inheritance of lands after his father died. Compared with other homestays, his business is large which is against CA001's (his cousin) concept of the development at a slow pace and on small scale. He commented that before he was also the supporter of the "Strategic Alliance". However, later he felt it is only an ideal and difficult to put into practice. CA001 and he constantly have arguments that undermine family relations.

He is concerned that if the quality of homestays in Chashan is not improved and facilities are not expanded, when an outside private consortium comes to purchase a piece of land from someone in big debt and then makes a large investment in building a hotel or a mall, local villagers will not be able to compete. Besides, the situation of agriculture will become worse in 3-5 years. If the Cou do not grasp the opportunity to make an economic transition, their livelihoods will be more difficult in the near future. He indicated that many pieces of land along the Alishan Highway originally belonged to Cou. Wealthy outsiders leased/purchased the lands and started to build big hotels and restaurants. Cou people have become workers in the businesses, doing jobs like washing dishes and clothes, cleaning room, and serving tourists. He secured a large loan and expanded his tourism enterprise because he does not want the above situation to happen to him.

He constantly experiences cash shortages because the majority of the cash earned from tourism enterprises, the grocery store, and the eatery is used to pay for the loan. During the typhoon season with no visitors and income, he has to borrow money from his relatives to pay the loan.

(Case continues)

Case 4: Using tangible and intangible assets to sustain tourism enterprises (*continued*)

His business concentrates on weekend, so during weekdays, his family are engaged in various other activities, such as looking after the grocery store and eatery, casual labour, planting crops for self-consumption, and harvest bamboo shoots in season. Bamboo shoots are processed and sold to tourists directly. These businesses support each other.

When business is busy during weekends, his business provides part-time earning opportunities to his relatives, friends, and junior high school students who return to Chashan, in tasks such as cooking, cleaning, driving, and interpretation.

From Interviewee CA003, 2004, 2005

Collective-run enterprise: Mother Tian under a Strategic Alliance

In recent years, the Council of Agriculture (2005) has arranged a number of classes to expand the opportunity for rural women to develop sideline production and to start undertakings including domestic work, looking after seniors and the disabled, rural cuisine, homestays, processing agricultural products and making local handicrafts. The classes are referred to as Mother Tian. Mother Tian in Chashan is run by several women (mainly members of the Presbyterian Church) as a restaurant to provide meals to customers of homestays, particularly members of Strategic Alliances. The dishes are made of local crops and livestock.

Reservation is required in advance, because it takes a whole day to make contacts and to collect ingredients, such as finding out who has free-range chicken or has collected wild vegetables in the mountains. They want to make sure that they serve the freshest dishes to customers. If local supply is not enough, the women in charge will purchase ingredients in nearby Cou villages and towns (Interviewees CD001, CD003, 2004). The benefits are multiple. First, households that do not run homestays can make cash through cooking and serving tourists. Second, households that run homestays with less labour do not need to worry that they do not have enough labour to prepare meals (Interviewees CD002, CD009, 2005). Third, local agricultural products can be processed as dishes with added value. For example, a wild papaya can be directly sold for NT\$20 (CAD\$ 0.80); it can also be made into two dishes for sale for NT\$100 (CAD\$ 4) per dish. With some labour and time invested, its monetary value can be multiplied 10 times through processing and service (Interviewee CA001, CA002, 2005). Fourth, after customers taste the dishes, they usually want to purchase the crops used

in the dishes. Mother Tian will then refer the customers to the crop producers. This creates a market and a sales channel for local farmers. Fifth, self-processed agricultural products are sold to tourists too, such as canned bamboo shoots and vinegar of pineapple and plum.

Enterprises run by the Presbyterian Church and individuals: cafés and eateries

Young to middle-age males usually migrate out of the village to do various casual labour to make cash. Women with young children usually stay in the village and are responsible for domestic work (i.e., taking care of children). An eatery business is particularly helpful to women with young children and newborn babies. Such jobs make it easier to look after children and to continue to engage in domestic work. When the business is not busy, the store offers a place for children after school to do homework together, to hang around and to obtain snack food. The cash earned is not the main source of income of households but it can be used for daily necessities, school fees, investment in production and as reserves for children's future education (Interviewees CE009, CD010, 2005).

Food stalls

Two individual-run food stalls operate during weekends, mainly serving tourists. One sells barbecued pork and sausage and the other their own agricultural products as well as those from the Farmers' Association.

Tour guides/interpreters

There are more than eight trained and un-trained tour guides/interpreters in Chashan. The majority of them are homestay proprietors. Individuals who are hired by homestays/guesthouses to provide interpretative service can earn NT\$ 1000-1500 (CAD\$40-60)/day. Several young male villagers said that being an interpreter is a good source of cash but cannot be regarded as long-term undertaking for livelihood support (informal conversation, 2005, 2006).

6.7.5 Summary of Livelihood Strategies

The number of households engaging in each activity, and the amount of income or benefit they gain, are difficult to quantify. However, it is clear that the majority of households grow crops and raise chicken for self-consumption. Casual labour and migration have been

considered the fastest way to meet cash needs. Households that mainly rely on agriculture have diversified crop production to disperse the unpredictability of market prices. Tourism enterprises have provided cash earning opportunities for less than one fifth of villagers with work ability and after almost eight years of development, its potential is only just being explored and developed.

The cases of Shanmei and Chashan, by using an historical approach, identify different livelihood pathways taken by members of the Cou tribe over different time scales. Each village has had its own process of initiation and development of tourism. The overall understanding of how those in both villages support their livelihoods has provided the context for an examination of how tourism has been incorporated into their livelihoods. The extent to which tourism initiatives, planning, and management have been experienced as positive or negative has also been examined. In the next chapter, each component of the sustainable livelihood framework will be examined through a comparison of the two cases. Both Shanmei and Chashan have adopted tourism as one of their livelihood strategies, but different institutional processes and organizational structures have led to different livelihood outcomes and have influenced whether feedback relations exist between livelihood assets and outcomes. Institutions and organizations have been guided by Cou culture. As a result, a cultural component has been added to the framework. Further, strengths and weaknesses of the framework will be discussed, as well as the implications of the results for broader views of tourism.

CHAPTER 7

DISCUSSION AND INTERPRETATION

7.1 Introduction

The sustainable livelihood framework provides a conceptual approach for examining the ways in which tourism fits (or sometimes does not fit) into the livelihood strategies of households or individuals with different types of assets and access to other resources. The chapter uses the sustainable livelihood approach, which has guided the reporting of the situations described in the preceding chapters, to compare results from the two case studies and to address the significance of institutional processes and organizational structures in the context of tourism development. From the comparison and discussion, strengths and weaknesses of the framework are addressed. Also, tourism as a component of livelihood strategies is related to broader views of tourism.

7.2 Conditions, vulnerability and trends

The overall conceptual framework for sustainable livelihoods is illustrated in Figure 7-2 (in Section 7.6.3). Both Shanmei and Chashan are relatively poor, marginalized indigenous communities in a post-colonial situation. As indicated in the framework, the analysis of history and national policies in the previous three chapters has indicated that the assimilation policies of the two colonial regimes promoted the modernization of the mountain region by economic means. This was done in an attempt to include the mountain region and its people in the broader economy of Taiwan. It was an important force that altered Cou livelihoods. The national policies of different periods introduced a market economy to the mountain tribes and caused the transformation of tribal cultures. After the 1980s, because of the protests of aboriginal movements, the National government's policies for Aboriginal peoples shifted from the protection of citizens' rights (socio-economic) to be assimilated into the broader society, towards pluralism involving respect for the ethnic groups' rights to preserve their special attributes. After the 1980s, the economy appeared to stabilize, martial law was rescinded and the society requested liberalization of political power. The policy emphasis shifted from the

development of an industrial economy towards social welfare, cultural continuity, education, and environmental conservation (S.-S. Wang, 2003). Consequently, policies relevant to cultural industries were proposed in succession. Moreover, because of the enhancement of local authority and change in the pattern of civic expenses, many marginalized areas attempted to use tourism and culture to drive local re-development (S.-S. Wang, 2003).

The Taiwanese economy is shifting towards a service- and high-tech-based economy. The traditional agricultural, forestry and fishing industries have been in decline. Small-scale agriculture has suffered severely in both domestic and overseas markets in the face of competition from major agricultural countries with superior capital resources and technology (V. Lee, 2004). Furthermore, the rise in agricultural imports that has occurred as a result of Taiwan joining the World Trade Organization (WTO) has forced many farmers to look for a second income. The crops produced by many indigenous communities in the mountains are unable to compete with those produced in the lowland due to the high costs of labour and transportation, a lack of markets and sales channels, a lack of marketing and processing skills, and the absence of a brand name. As a result, promotion of a recreation-related industry, such as a leisure agricultural industry, has been deemed to be necessary (interviews, 2004-2005).

Shanmei and Chashan share similar climate and agro-ecological conditions which are factors influencing livelihood activities. Results of interviews and secondary data suggest that due to the described contexts, conditions and trends, the two villages have changed their lifestyle from traditional hunting and gathering, slash and burn agriculture, and fishing, to current mixed livelihood activities including employment (permanent and casual labour), crop production, livestock raising, trees and plant harvesting (bamboo/wood, thatching grass and mountain products), fishing, hunting and tourism-related activities. Except for wage employment and tourism-related activities, the activities serve both subsistence and cash needs. The proportion of tourism-related activities only occupies up to one third of the whole spectrum of economic activities in Shanmei and one fifth in Chashan. Livelihoods are composed of a mixture of activities.

7.3 Livelihood Resources and Similar, yet Multiple and Dynamic Portfolios of Different Activities, i.e., Similar Livelihood Strategies

Both villages use a variety of resources including social networks, labour, land, capital, knowledge and markets to produce food and marketable commodities and to generate income. They share a number of similar livelihood strategies. Few households can meet all their needs through one activity. The key characteristic of both Shanmei and Chashan livelihood strategies is that a combination of activities and resources is used. People seek to balance the time, resources and risk allocated to various activities, so that a wide range of needs are met. The strategies employed are continually adapted to changing situations and hence are dynamic. Another essential point is that there is enormous variation between households and years in the types and balance of activities undertaken.

The main strategies used include wage employment (mainly casual labour), migration, subsistence agriculture (crops, livestock) mainly among those aged over 40, cash crops for limited cash income, and the harvesting of wild natural resources, including game, fish, honey, fruits, wild vegetables and medicinal plants. Almost every household is involved in some level of agricultural activities but the most often mentioned economic activity is casual labour. Tourism enterprises are growing in both villages. Tourism has started to play an important role in Shanmei but is currently small but growing in Chashan, in terms of the number of visitors, the capitals invested, and the proportion of villagers involved. Instead of agricultural intensification – extensification as indicated in the framework described in Scoones’s paper (1998) as Figure 2-3 (in Section 2.4.4), agricultural *diversification* on a small scale is a livelihood strategy employed in both villages. Tourism in Chashan has slightly contributed to such agricultural diversification by spreading production activities to several tourism-related enterprises and creating new markets for the sales of agricultural products and local specialties. This indicates the inadequacy of agriculture as a source of cash income and the widespread dependence on off-farm income. Moreover, both villages have experienced strong external influences. They rely on strong links with the outside world for job opportunities and for tourists.

Differences or similarities?

Although many things could be discussed, two important themes will be emphasized that differentiate the villages. These are institutional processes and organizational structures, and types of tourism. In Figure 7-2 (in Section 7.6.3), tourism fits in one of the livelihood strategies that is identified – livelihood diversification.

7.3.1 Livelihood Strategies, Livelihood Diversification, Tourism, the Cultural Economy and Social Capital

Shanmei and Chashan illustrate the conscious utilisation of local culture and history in the marketing of the region and localities as tourist destinations (Jóhannesson *et al*, 2003). Aboriginal tourism-related livelihood activities rely on aboriginal culture as an attraction; therefore, culture is a kind of capital possessed by aboriginal people that is used to create income. Because cultural capital is not mentioned as a livelihood resource in the framework, the concept of cultural economy as described in Ray's papers is used to understand relationships between culture and tourism. Ray (1998, 1999) conceptualizes the cultural economy in rural areas through identification of four operational modes. Mode I is creating identity for local cultural products (including commoditization of historical and environmental components) through territorial identity (e.g., traditional lifestyle or collective knowledge). This refers to the creation and valorization of resources that have a place identity and that can be marketed directly or used in the marketing of the territory (e.g., agri-food products, regional cuisine, and crafts). The mode emphasizes two rationales: one is that the linking the product /service to territory enables the locality to retain more of the economic benefits; the other identifies the ability of local, fragile cultures to control the type of economic activity that occurs, moulding it to support, rather than dilute, the local culture (Ray 1998, p.5-6). The mode is suitable for ethnic /cultural tourism. Mode II is that territorial identity can be constructed and promoted externally by the identification with cultural markers. Gu fish, pavilions and the display of innovative aboriginal dances are examples of this in the study area. Either by using an existing organization (local authorities, development agencies, etc.) or through the development of a new-co-operative structure, a territorial initiative is taken to establish and promote identity. In Mode III, the new territorial initiative is engaged in selling itself internally: to the communities, businesses, groups and official bodies of the local area.

This Mode seeks to animate endogenous development in marginalized, declining areas through raising the self-confidence of local people and organizations, building confidence in their own capacity to bring about development, and valorizing local resources. This mode is especially important in those cases where, historically, local cultural identity has been suppressed or devalued by dominant (usually state or colonial) authorities. Mode IV emphasizes that the local culture and its economy can be both the purpose and means for enhancing local development, enabling the area to compete more effectively in the global economy. A soft form of local protectionism is used to control the impacts – economic, social, cultural and environmental – on the locality (Ray, 1998, 1999). The four modes are not distinct from each other but overlap and are mutually supportive. Figure 7-1 illustrates the conceptualization of the cultural economy through four operational modes.

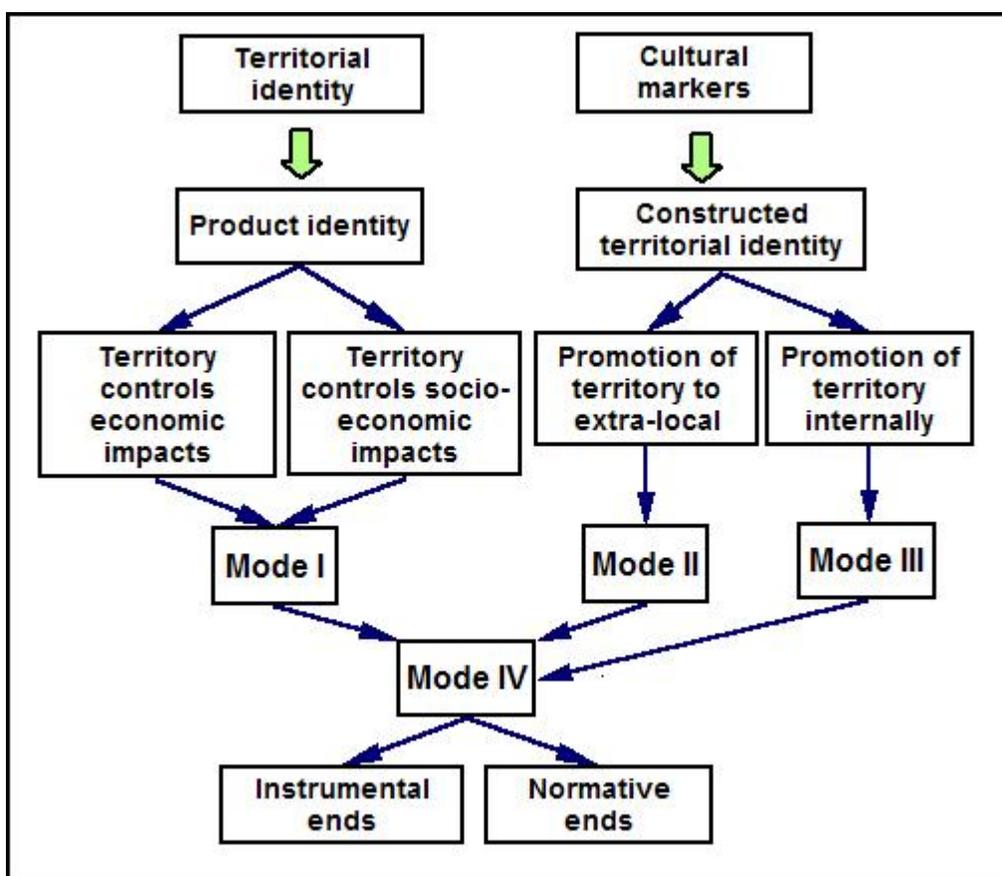


Figure 7-1: Typology of the Culture Economy

From Ray (1998, p.6)

The following analysis concentrates on Ray's operational Mode I and Mode III to identify the territorial initiatives of Shanmei and Chashan employed in the pursuit of rural development. The discussion of territorial identity and cultural markers, combining other aspects of Cou culture (e.g., collective action, social relations and networks), explores the issue of the cultural sustainability of tourism development in indigenous communities.

Initiation of territorial identity: identity and innovation of traditional ecological knowledge (TEK), collective action, and social relations and networks (social capital)

Shanmei

Local territorial identification in Shanmei was promoted by the establishment of Danayigu Ecological Park by the Shanmei Tourism Research Group in 1985 and the Shanmei Tourism Promotion Committee in 1987. Gu fish were used as a cultural marker in 1989, leading to the winning of a prize from the Council of Agriculture in 1992 for being a model for the promotion of ecological preservation. All of these actions belong to the stage of the creation of territorial identity (Liang & Chang, 2005). Traditional knowledge of river fishing and the relatively closed geological landscape of Danayigu that is easily to manage provided an opportunity to actualize the tourism imagination for both the host and guests (Li & Tang, 1999; Liang & Chang, 2005). However, the practice of tourism inevitably faced the management of knowledge across cultural borders for tourism is not an indigenous activity. Innovations were required in local knowledge and practice, such as shifting traditional joint families' river fishing grounds, which had social and symbolic meanings into collectively owned tourism space, and shifting the custom from eating fish to watching fish. In the face of villagers' queries and challenges as the initiative was put into practice, recreation of identity become an important means underpinning the process of innovation and adaptation (Liang & Chang, 2005). Until 1979, Shanmei still used river resources according to traditional norms and the majority of Shanmei residents still remember the custom clearly. It is an important part of the social capital of the place that regulates Cou ways of fishing and their fishing behaviour. Berkes (1999, p.1252) pointed out that traditional knowledge is a knowledge-practice-belief complex, "evolving by adaptive processes and handed down through generations by cultural transmissions, about the relationship of living beings (including humans) with one another and with their environment". Knowledge refers to the local observational knowledge of species

and other environmental phenomena; practice refers to the way people carry out their resources use activities; belief refers to how people fit into or relate to the ecosystem. Such local knowledge includes and specifies ways of doing things and ways of understanding the world (a cultural society and an accumulated belief system that is formed by an understanding of how living things relate to each other and relate to the eco-system), the way of doing things (the way people carry out their resource use activities) and, in this case, ecological knowledge of river culture. A Cou scholar described the process of the ecological protection and conservation of the Danayigu River from the point of view of the action initiator (M.-H. Wang, 2003 p.10):

The key to Danayigu's success is certainly not in a formal management pattern, nor the superiority of natural scenery, but lies in the continuation of the deep, traditional river culture and collective ownership of Cou clans. Under the logic of the market economy, it takes advantage of trends and creates a monopolized economy in the locality.

The identification of traditional river knowledge helped to revive river culture, to establish Bylaws for the Danayigu Self-Administered Conservation District, and to continue the spirit of collective sharing. Even if fish protection was initiated for economic gain, from a deeper perspective, whether actors applied the idea of ecological conservation, resorted to the revitalization of traditional river management, or practiced religious beliefs (Fu, 1998), they all represented the regeneration and practice of river culture (Liang & Chang, 2005). This helped to persuade the elders to approve the plan, release river rights, and promoted the villagers' approval of the self-administered bylaws (Liang & Chang, 2005).

The taking of Gu fish as a cultural marker was an innovation in the existing culture and a step taken in pursuit of a new identity. To villagers, the Gu fish is a real fish which has cultural (good taste) and economic significance, but does not contain ornamental value. Church networks facilitated the innovation (Liang & Chang, 2005) and through the mobilization of the Presbyterian Church and women in the village, more than 12,900 Gu fish were released in the Danayigu River for artificial reproduction 10 days after the village assembly in 1989. During the period of river restoration, members of the Presbyterian churches in cities came to visit Danayigu and supported the conservation action by donations and brought in more members for visits. This changed residents' perspectives on Gu fish. Later, a large number of visitors' poured into Shanmei resulting in enhanced incomes which

further strengthened the new identify with Gu fish. The increased income is the main factor in the change in perspective but the social relationships though the unofficial organization of the church is important capital (Liang & Chang, 2005).

Chashan

The previous village head, CA001, promoted Chashan as a tribal park by encouraging every household to build its own garden and pavilion. Collective production, sharing and pavilion culture are original ways of Cou life. They have been re-created as a symbol of the cultural economy – tourism. As a poster for the Pavilion Festival in 2003 indicated: “In the past, the *kuba* in a larger society (head-village) was the men’s meeting place and the centre of the tribe. Hunted and trapped wild game was distributed in the *kuba*. Chashan is a *lenohiu* (small society or branch-village) and does not have a *kuba*, but it has a *hufu* (pavilion) on a smaller scale than a *kuba*, a place for game sharing with relatives and friends. Chashan consists of multiple ethnic groups with different languages, habits, and customs, and through meetings and get-togethers in pavilions, reaches reconciliation among multiple ethnicities.” (cited in S.-S. Wang, 2003 p.35-36). This quotation concerning pavilion culture emphasizes that Chashan is a village of immigrants with a *lenohiu*’s (branch-village) characteristics. In the concept of the Cou people, a *hosa* (larger society or head-village) includes a number of scattered *lenohius* (smaller society or branch-village), combined into a complete tribe. An *emoo*¹ includes a number of scattered *hunou*¹ (farm hut). The emphasis of the "central branch" of the social structure focuses on the mechanism of sharing in the *kuba*, and it also signifies that a *hufu* is regarded as being an important space for sharing in a *lenohiu* (Luo, 2004).

Innovation in local knowledge, sharing and managing knowledge across borders, is embodied in the following ways. Through the Pavilion Festival, visitors are invited to join with local people and to share in their happiness in a series of activities, such as tasting Cou traditional dishes and exploring scenic spots. Homestay proprietors often invite visitors to a *hufu* for tea tasting and to share freshly picked fruits and Cou culture. Pavilions in Chashan represent social space signifying the culture of sharing. While a pavilion has been created as an economic symbol, it is in fact also an element in the process of cultural revitalization and in the practice of economic life (S.-S. Wang, 2003).

¹ All the households of the same sub-clan (i.e., union of households or joint-family) in the same “village” form not only a ceremonial unit but also, to some extent, an economic one. Only the head-house of the union is called *emoo*, the other houses being *hunou* (farm hut) (Mabuchi, 1951).

Collective action (social capital) originating from a sense of place

Shanmei

Cou people regard the past as a part of the present and usually use the past to interpret the present (S.-S. Wang, 1997). From the aspect of space, incidents in the past inevitably occurred at certain places and created a sense of place (S.-S. Wang, 2003). These aboriginal people do not have a written language. Space facilitates memorizing and is a part of the operation of memory (Huang, 1995, cited in S.-S. Wang, 2003). Places become references to the collective dialogue of history and attachment (Liang & Chang, 2005). Danayigu, Shanmei Public School, and Route 129 are places where collective actions have taken place and they were constantly mentioned as being historically important in interviews. Villagers have strong sense of place in these locations. Their attachment to the places reflects collective voluntary work undertaken from the past to the present and it has become important social capital (Liang & Chang, 2005). The social capital has not only been used in strategies to persuade elders to release river rights (please refer to Appendix E for detailed information), but it also explains the voluntary collective actions of trail construction, river patrolling, and the repair of damage caused by typhoon Herb² in 1996 (Liang & Chang, 2005). Here social capital, as embodied in the participating groups, became a way of overcoming natural capital constraints. Whether tourism can contribute to sustainability on a community level in terms of reducing vulnerability and enhancing resilience hinges upon maintaining a certain level of cooperation within the community. Danayigu is traditionally a sacred site of the tribe; it is a place where the memories of fishing are stored. The shared sense of place of Danayigu motivated action initiators to take action. For example, to the previous village head SB001, Danayigu is the place where he learned to walk again after being bitten by a snake in his childhood.

² Typhoon Herb in 1996 caused severe damage in Danayigu. The roads and trails were destroyed and two thirds of fish in the river were flushed away. Patrol staff found there were still some fish in the river. The fact that “there were still fish left” brought Shanmei residents some hope. Recollecting the effort has been put into Danayigu in the past, the entire village reached consensus to reconstruct the place. An emergency meeting was hold to discuss response measures. Seven neighbourhood unit heads assembled Shanmei residents, about 100 people, to carry out the task of reconstruction. Most problems were taken care of in the first two days. The chair of the board of directors (2001-2004) commented that the merit of Shanmei Cou is that when villagers reach consensus, they will make attempts to accomplish the task. If the task cannot be accomplished, they will then seek for help from the government. Such attributes distinguish Shanmei from other villages (Li & Tang, 1999).

Shanmei villagers started to patrol the Danayigu River in 1999, no matter whether day or night, sunny or rainy, and consequently they have developed a strong attachment to Danayigu. The villagers often walk in Danayigu during slack periods in farming. Young people regard Danayigu as a place to get together at night (Wen, 2000). Participants in river protection generated new attachments to Danayigu. Strong place attachment and territorial identity led to strategies, decisions and actions leading to place transformation (Paradis, 2000).

Chashan

Similar to Shanmei, Chashan public school, Route 129, trails, and scenic spots are examples of collective initiatives. However, after the re-election of the village head and the chair of the board of directors, a lack of communication between leaders of the organizations reduced coordination. As a result, community collaboration is less well-developed in Chashan than in Shanmei. Although pavilions have been built and maintained by villagers as a collective project and there is a common perspective that people agree that pavilions symbolizes the Cou spirit of sharing and attract tourists, community affairs have not been co-ordinated and financed in such an elaborated way as in Shanmei.

7.4 Organizational Structures and Institutional Processes

As highlighted in Figure 7-2 (in Section 7.6.3), organizational structures and institutional processes combine livelihood resources and allow tourism, as one of several livelihood strategies, to be pursued and different outcomes, from tourism in particular, to be realized.

7.4.1 The Role of Individuals

Both Shanmei and Chashan share a similarity: the prominent role played by individuals with foresight. This can be placed under institutional factors in the framework even though it is not mentioned in the framework specifically. SB001, a previous village head in Shanmei, and CA001, a previous village head in Chashan, had a good grasp of Cou traditional knowledge and guided the creation and valorization of resources that have been linked to place identity and that have been marketed directly or used in the marketing of the territory (Ray, 1998). They have enabled residents in Shanmei and Chashan to be innovative with “traditional” knowledge and to generate new identifications, enabling tourism activities to be produced or grown from within rather than derived or developed from outside. They have emphasized the

esprit de corps of the Cou people's clan system with collective actions and have applied it to local institutions for tourism development. From the perspective of the cultural economy, "both the local/producer and the extra-local/consumer can be conceptualized as having a power of agency. The culture economy thus fits with the emerging theory that development activity of local territories consists of both endogenous and exogenous forces in dynamic relationships or creative tensions..." (Ray, 1998 p.4). Filling the new economic activities with meaning and the spirit of "traditional" knowledge has increased their endogenous strength and facilitated local control of development.

By using their significant status in the Presbyterian churches, SB001 and CA001 have put their ideas into practice by exercising social relations (important social capital) of the unofficial organizations of the churches. They encouraged and guided villagers to engage in tourism development activities. Such involvements and learning processes have generated new identifications and tourism-related activities have gradually become part of villagers' lives. Cherishing a religious-like spirit of devotion and persistent learning, SB001 and CA001 have built upon their ideals with actions.

7.4.2 Organizational Structures

The framework also helps to promote the understanding of the significance of organizational structure, social norms and institutions, in addition to leadership, when using tourism as a livelihood strategy. Shanmei Community Development Association is the only organization with set regulations for decision making in Shanmei, while Chashan has three (i.e., village office, Chashan Community Development Association, Chashan Leisure Agricultural Area Development Association). In the former case it is easier to reach consensus and implement tasks and projects effectively to earn tourism income while, in the latter case, it is difficult to reach consensus and to control the development process because there are no specific procedures and regulations to guide decision making between the organizations.

The significance of common property resources and the institutions for its management

Because of the Cou's spirit of sharing, Danayigu Ecological Park was established as a common property resource (CPR) owned by all Shanmei residents. A definition of CPR is "a property on which well defined collective claims by an exclusive group are established, the use of the resources is subtractive, having the characteristic of a public good such as

indivisibility shall be termed as common property resource” (Kadekodi, 2004 p.19-20). Because of the spirit of sharing, the regulations of the association set up in the early stage of tourism development clearly stipulated that collective income generated from the park is to be used for all Shanmei villagers. The spirit is reflected in the benefit-sharing system. Through the system, the collective income (economic capital) is transformed into the following forms of capital and a strengthened asset base (i.e., livelihood resources): 1) human capital, such as skills, knowledge and creativity through various training classes and group formations; 2) physical capital, such as the improvement and construction of buildings and roads; 3) social capital, such as the establishment of a welfare program as a safety net and strengthening of the association’s governance structures; and 4) financial capital, such as collective savings to generate interest, maintain the facilities within the park where cash is generated, and to provide production equipment for local farmers. As demonstrated in the framework, major feedback relationships exist between livelihood outcomes and livelihood assets through the system of benefit sharing.

The system also directly contributes to livelihood outcomes. Overall community enhancement benefits each individual within the community. Almost every household in Shanmei has links to the park and this maintains the park’s territorial identity. A number of paid jobs created in the association and the park are required for their effective operation, also enabling poor households, the jobless, disabled, women, and senior people to obtain opportunities to earn cash, reduce dependence on government subsidies. When pursuing economic development, the system reduces vulnerability caused by social differentiation, uncertainty of tourism-related activities and the macro-economic conditions of the market economy. As indicated in the framework, major feedback relationships exist between transforming structures and processes and vulnerability. The system also improves other aspects of well-being such as a sense of control and maintenance of cultural assets (e.g., Gu fish, collective ownership) and thus has a feedback effect on vulnerability and the asset base (Adato & Meinzen-Dick, 2002). The system not only sustains tourism itself but also contributes diverse benefits to the economic, environmental, social, and cultural aspects of Shanmei villagers’ lives. A form of tourism is in place that contributes to equity, cultural integrity, and community capabilities to achieve sustainability through livelihood outcomes as indicated in the framework. It is not the establishment of a new community-based

organization that, in itself, indicates progress, rather it is the fact that the community appears to be able to develop institutions *appropriate* to the task at hand and to *adapt and develop* them to meet new challenges or overcome problems (Ashley, 1998). Tourism enterprises in Shanmei include businesses that are both collectively and privately owned. The former enables the majority of villagers to benefit and, thus, obtains their approval and support. Though a few private enterprises pursue maximum personal profits in a cost-effective manner, unless under the control of a community cadre (e.g., the chair of the board of directors), they have limited influence on the system for the distribution of collective revenue.

Common property resources and the institutions for their management have created several advantages. A large amount of income is generated from the park and the relatively even distribution of benefits obtains Shanmei villagers' approval. One main reason that Danayigu river protection can continue is because its common property management and institutions enable many villagers' livelihoods to be improved. Conversely, the main reason that Chashan's river protection did not succeed is because the majority of villagers' livelihoods cannot benefit from such protection. Conservation has attracted visitors to the Danayigu park and Shanmei villagers have realized that catering to incoming visitors can benefit their lives. Therefore, they continually support the river protection. In Chashan's situation, only small proportion of villagers have benefited from conservation (e.g., river protection), while the majority cannot make a connection between their lives and environmental protection (one important component of ecotourism). Therefore, the river protection did not succeed.

Social capital has facilitated common property (natural capital) management wherein collective action is needed to coordinate the action of individuals for adherence to rules. The Cou emphasize collective values coming from the principles of the "central-branch" of the Cou's social structure which encourages the development of a collective force (S.-S. Wang, 1995). Culture, traditional ecological knowledge, management rights, and institutional capacity are preconditions that are in place that enable effective common property resource management (CPRM). Thus, Cou culture has guided the institutional processes and the transformation of organizational structures, as indicated in the framework.

Chashan

Experiencing a fast-changing economy, revision of the existing institutions of labour division was unable to keep up with the speed of tourism development. Increased tourism fame has attracted a large number of visitors that exceeds local carrying capacity. The acquisition of more public resources from outside has brought increased pressures on administration and incomplete accounting system, as well on the distribution of power and benefits. Moreover, increasing interaction with outsiders (e.g., tourists, government organizations, planning firms) has complicated an originally simple and quiet life in Chashan. Even though the operation of Chashan Leisure Agriculture Area Management Centre, the establishment of limits on visitor numbers, the pre-registration system designed to control the number of visitors, and a reservation system for meals have been introduced to respond to the needs of tourism development during the growth stage, there have been many challenges.

Lack of consensus and the free rider problem

At the early stage of tourism development in Chashan, it was intended that benefits would be shared throughout the whole community across the differences of ethnicity, sub-clans and churches. However, in the course of development, many villagers have been suspicious about tourism operations. As the Cou minister of the Presbyterian Church indicated, three positions exist among villagers concerning the implementation of a benefit-sharing system. The first is the initiators of the institutions (e.g. labour division) who continue to support collaboration mechanism. The second is those who wait and see: they watch the situation before deciding whether or not to co-operate. The third is those who do not participate at all. The lack of communication platform between community organizations and individuals hampers progress.

The economic principle common in the community is different from that of the capitalist market economy. The driving force of the latter is pursuit of the maximization of individual interests and cost effectiveness, while the former emphasizes that the livelihoods of all community members are sustained through various forms of cooperation (Luo, 2004).

Even though the intention was to operate the community economy by expanding the range of cooperation based on trust, the external capitalist environment has had far-reaching impacts (Luo, 2004). For example, homestay proprietors (a small proportion of the villagers) and travel agencies are free riders who have taken advantages of the established resources after Chashan became well-known. Because of the increasing opportunities to make profits, the

villagers who originally held a wait-and-see attitude began to operate businesses in ways that deviated from the concepts of limiting the number of visitors and making reservation for meals in advance. Two extreme views exist on limitation of the number of visitors. One advocates limitations to maintain service quality and reduce the impacts of tourism on original homestay proprietors, while the other hopes to increase the number of visitors in order to increase income generation. Rules are flouted in pursuit of personal interests and costs increase to those who operate in accordance with the rules (Luo, 2004). Bowles and Gintis (2002) indicated that the free rider problem can be overcome if the community's members punishing the 'anti-social' actions of others. Monitoring and punishing by peers in work teams, credit associations, and partnerships are often effective means of attenuating the incentive problems that arise. Nonetheless, where individual actions affecting the well-being of others are not subject to enforceable contracts, the following problems emerge, such as anti-cooperation, slandering of leaders, establishment of another organization to obtain external resources to continue one's ideals, and expanding free riding on the provision of a collective good. The problems originated from a lack of complete institutional arrangements that cause the original sharing mechanism to decrease progressively in effectiveness.

Under such a situation, when a homestay becomes an individually-run business, tourism can potentially increase inequality within the village because a small proportion of better-off villagers are able to take advantage of common property and the tourism development trend (e.g., popularity of the leader CA001 and the Ceayama Band). This contrasts with the spirit of sharing, as represented in Strategic Alliances and the pavilions. Conflicts start to appear between villagers who run tourism enterprises and those who do not. The latter feel that the increasing number of tourists has brought noise, traffic and garbage which disturb their lives. Some villagers have threatened to close the roads leading to the scenic spots since most of these lands are privately owned and they have to clean after tourists leave but without any benefits. Other villagers (Interviewee CA001, 2004) complained that:

“We had an agreement before: the village does not belong to certain people. How can certain individuals not to obey the agreement? Every one should have some share of the benefits, but why do some people now make a lot of profits?”

A homestay business relies on neighbourhood amenities and the surrounding environment (i.e., tranquility, gardens, pavilions, local attractions and the agricultural products of other households). However, homestay businesses have not yet been combined with local agriculture and life, even though the original plan was to do so. The tourism development has been tourist-oriented rather than oriented towards local villagers. Livelihood resources have been used to “sustain” tourism development. Co-operative mechanisms, such as the institution of labour division, have to be strengthened if tourism is to contribute more strongly to overall well-being.

Shanmei

Shanmei also has experienced conflicting ideas within the leading group and the free rider situation, related to cooperation and competition among sub-clans of Shanmei (Shi, 1999, cited in M.-H. Wang, 2001 p.275). For example, an influential family (belonging to a certain sub-clan) made use of their position as Alishan Township’s people’s representative to combine the local political parties of Jiayi and an influential family of the *hosa* (the larger society) to control Shanmei village funds. This stirred up discontent in Shanmei (M.-H. Wang, 2001). The family originally did not support the plan for Danayigu ecological conservation, but built two restaurants and a villa to run personal tourism enterprises at a time when Shanmei villagers were striving for prosperity in the initial stage of the development. A member of the family served as the Chair of the Board of Directors of Shanmei Community Development Association several times. He often used community revenues without following the original plan that was based on collective decision, by forging receipts, over-reporting expenses, and delaying or not paying wages. Eventually he resigned because in 1999 the Shanmei General Assembly proposed a motion of censure. This instance demonstrates the importance of clear regulations embedded in organizational structures with checks and balances that limited the exercise of personal decision making.

The following points emerge from a comparison of Shanmei’s and Chashan’s organizational structures and institutional processes concerning tourism development. Even though both villages started with the use and adaptation of common property resources and a benefit-sharing system, subsequent decision-making procedures have determined whether tourism-generated income can strengthen community asset bases, reduce vulnerability caused by the risky characteristics of tourism and the global context, and whether the type of tourism

can complement other livelihood strategies (e.g., contributing to agricultural diversification). Moreover, the approval of the majority of villagers is an important factor for a tourism initiative to succeed. In other words, long term economic development should reflect local cultural values, attitudes, and activities (Witherspoon & Butler, 1999). Since institutional arrangements shape the processes of tourism development, understanding of institutions and institutional change is central to the analytical framework. The case studies lead to a view of “institutions not as the rules themselves, but as regularized patterns of behaviour that emerge from underlying structures or sets of “rules in use.” Rather than existing as a fixed framework, “rules” are constantly made and remade through people’s practices.” (Leach, Mearns & Scoones, 1999, p.237). As indicated by S.-S. Wang (2003) who has studied the politics, society and culture of the Cou for over 20 years, collectivism driven by Cou culture touches, collides with and joins individualism driven by economic concerns. When the tribal culture is faced by the market economy, the tribal industry’s economy consists of three aspects that reflect the characteristics and demands of the tribe: industry (e.g., tourism, homstays, hot springs), the organizations of management and administration (e.g., communal ownership, cooperative society), and loaned funds (e.g., small-scale enterprise fund, employment fund, comprehensive expansion fund). Tourism, homstays, and hot springs are examples of tribal villages’ potential advantages for economic development. Common property resources, a cooperative system and collective action reflect the characteristics of local culture. When coordinating with government cultural policies, such as identifying cultural markers and cultivation of local talent, the tribal cultural economy changes (S.-S. Wang, 2003, p.11). Culture, like an amoeba, appears in different forms with external stimuli but its essence stays.

Significance of social capital: Reduced vulnerability

Social capital, a livelihood resource that is identified in the framework, has also played an important role in influencing the consequences of a range of tourism-related activities in both Shanmei and Chashan. Social networks and social relationships serve as a buffer to increase positive aspects of tourism and reduce negative ones. For instance, when external shocks (e.g., typhoons) are encountered, individuals whose livelihoods rely mainly on tourism often borrow money from relatives and friends to pass through a period of cash shortages. Local food that is supplied to tourism enterprises relies on the reciprocal exchanges of a strong social network

between Cou villages in the Alishan area. Collective actions based on community solidarity reduce the vulnerability of high-risk tourism and uncertainties generated from changing external and internal factors. The social capital relies on kin-based (clan, tribe) relations and practices. In terms of tourism's contribution to local lives through social networking, for example, some farmers in Chashan provide their agricultural products to households with homestay businesses. If homestay proprietors only want to make profits, they can choose cheaper products from outside instead of local specialties with higher prices. Family and relatives support each other in various forms, such as offering labour during harvest seasons and during the peak tourism season. As indicated in the framework, assets are the strengths or endowments on which people draw to carry out livelihood activities and achieve outcomes.

7.5 Type of Tourism

7.5.1 Livelihood Strategies, Livelihood Diversification, Tourism and Recreational Agriculture (agricultural diversification)

Chashan

Even though Chashan's labour division institution has faced a number of challenges, its consideration of the majority of villagers' (farmers) benefits and the intention to make diverse connections between tourism and other economic activities (both intra-household and inter-household) has a number of advantages. One example is the revitalization of declining agricultural and forest industries through agricultural diversification instead of agricultural intensification and extensification as indicated under the livelihood strategies component of the framework (Figure 2-3 in Section 2.4.4). Abandoned orchards, bamboo fields, and various farmlands have gradually been opened to visitors for them to participate in various recreational activities, such as picking fruits, involving them in the production process, and purchasing processed agricultural products. Visitors can also be involved in making bamboo cooked rice³. Recreational agriculture provides opportunities for economic diversification and offers new livelihood options that are close to lifestyles of local people and contribute to the construction of a sense of place. This potential exists to expand opportunities for more

³ Bamboo cooked rice is a traditional Cou dish made by stuffing bamboo sections with glutinous rice flavoured with meat, yam or pumpkin and placing them next to a fire to cook.

villagers to be involved in activities linked directly and indirectly to tourism and to reduce the risky characteristics of tourism.

Chashan's economic orientation is changing. After the local processed agricultural products, such as canned bamboo shoots, became well known and the demand for them increased, several community cadre discussed how to assist local villagers to produce them in larger quantity. This might inspire some households to work the abandoned agricultural land.

Diversified long term adaptive strategies in Chashan

Without subsidies from government and unwilling to bear debt risks, many households are slowly starting to move in the direction of leisure agriculture. Some invited their friends to experience the harvesting of bamboo shoots. Some plan to run a café and combine it with planting vegetables and flowers. Some are starting to convert land to campgrounds and to use other existing industries as attractions, such as Gu fish watching and the sale of ginger-cane candy. Some have started to plant fruit trees. Fruits in an orchard can either be harvested and sold to in a market or opened to tourists as a recreation orchard. In Chashan neighbourhood unit one, members of the True Jesus Church planned to invite all members of the churches in Jiayi to come to Chashan during the fruit harvesting season so that the homestay proprietors could have more business. Others started to plan their lands for their retirement and to incorporate leisure industry components into their plan, including the plantating of trees and flowers, design of trails and pavilions, and the raising of chickens, ducks, boars and sheep as attractions. Two households actively expanded the number of livestock to accumulate physical capital which could be readily transformed into financial capital. Once the assets have been stabilized, they can secure a loan to build small log cabins and then need not worry about having no cash turnover.

Shanmei

At present, tourism income in Shanmei is mainly the collective income generated in the Danayigu Ecological Park. To further expand the contribution of tourism to local livelihoods, perhaps Shanmei can adopt the pattern of Chashan which has revitalized and diversified traditional agriculture through tourism activities. As mentioned in the previous chapter, strategic alliance among different industries (e.g., livestock husbandry, vegetable production, homestay business) needs well developed institutions to facilitate co-operation on

an inter-household level. Case 5 illustrates the industry's pluralism at the intra-household level, combining agriculture with service industry (tourism).

Case 5: Combining agriculture with service industry (tourism)

CD010 and CE009 are Cou females in their late thirties. CD010 has four children while CE009 has two.

CD010 and her husband CE012 (aged 36, Han) used to be involved in tea production in Nantou County. The massive earthquake on September 21, 1999 caused severe damage to tea plantations in Nantou. At that time, the tea-production business was also declining. Knowing that an increasing number of visitors were coming to Chashan, the couple, who did not have other skills, decided to return to Chashan to run a small business. CE012 first helped Chiayama Villa as a tour guide, taking tourists sightseeing and preparing food, such as roasted pork and sausages. Eventually, the couple rented a piece of land (NT\$30,000 or CAN\$1200/year) from one of CD010's relatives and opened a Chashan eatery. The business of the eatery mainly comes from independent tourists and group tourists from homestays during weekends. Behind the eatery is a field planted with various crops (e.g., millet, fragrant rice, taro, and corn), vegetables, and flowers which are supplied to the eatery and sold to tourists directly.

CE009 used to work in Taipei and her husband CE021 (aged 41, Cou) used to be an office clerk. A few years ago, the couple decided to return to Chashan because CE021's mother in Chashan was ill. In the beginning, CE009 was a normal housewife engaged only in domestic work. CE021 suggested that CE009 sell breakfasts to earn some cash to subsidize family expenses. CE009 borrowed a small space at the Chashan eatery to set up a stall for the sale of breakfasts.

CE012 later felt that the income from the work for Chiayama Villa was not stable. The couple (CE012 and CD010) considered the future large tuition fees for their four children and CE012 decided to engage in weeding with CE021 outside of the village (over \$2000/day). The weeding project of the Directorate General of Highways occurs every year and a contract period is usually one year. The main source of income of the two households is now from weeding but the income of the Chashan eatery is indispensable too. The eatery also offers a place for the children of the two couples to do homework together after school, to hang around and to get snack food.

(Case continues)

Case 5: Combing agriculture with service industry (tourism) (*continued*)

Inspired by Shanmei villagers' Yi-gu-ya-jwu lodge and Yubas café which earned a good word-of-mouth reputation because of their good service and beautiful environment, CD010 and CE009 helped each other slowly to enhance the quality of their eatery. They created various dishes and their husbands used local materials to make comfortable chairs and tables. Stopping the sale of alcohol helped to eliminate certain noisy and unpleasant customers and provided the children with a less complicated environment. They also planned to expand the eatery by planting grass on part of the field and setting up tables and chairs outdoors, so their customers could enjoy the beautiful view behind the eatery. Recently, CE009's father-in-law planted coffee and the two women attend a class on how to cultivate, harvest, and roast coffee beans and how to make coffee on a small scale. They also plan to create a garden café right beside the eatery in the near future.

Under the influences of the external environment and inherent conditions, the combination of farmland, an eatery, and a café provide a good example to demonstrate how some local villagers have gone through a transition from traditional agriculture to leisure agriculture and service industry. For both households, the purpose of such transition is more than only making cash. It is more important to pursue a better quality life by creating a better living environment for their families and the guests that come to the villages.

From Interviewees CD010, CE009, CE012 (2004, 2005)

7.6 Limits of the Sustainable Livelihood Framework and its Adaptation

7.6.1 Culture and Culture Change

The framework is helpful to examine if and how tourism has been incorporated into the livelihood strategies. Given a vulnerability context, villagers have used a combination of livelihood resources (e.g., TEK as human capital, social network as social capital) through a variety of institutional processes (e.g., collective action, Presbyterian churches) to protect the river and to apply spirit of sharing to pavilions that facilitate tourism development. This has resulted in the ability to follow a combination of livelihood strategies (e.g., tourism, agricultural diversification) with varied livelihood outcomes (e.g., more income, increasing well-being).

There are, however, several aspects of people's lives that are not captured in the framework, yet they are important in explaining people's choices and decisions. The

framework is unable to demonstrate the Cou view of economics, guiding institutional processes and transformations of organizational structure and value behind the options of livelihood strategies. Therefore, culture is added in the revised framework (Figure 7-2, in Section 7.6.3). This has been done because the needs of the collectivity take precedence, particularly with regard to the distribution of wealth. The fundamental difference in emphasis between the aboriginal view of economics and the beliefs of liberal capitalism relates less to the means by which wealth is created than to the appropriate distribution of resources once these have been acquired. Aboriginal cultures share a deeply embedded belief that the welfare of the collective is a higher priority than the acquisition of wealth by the individual (Royal Commission on Aboriginal Peoples, 1996 p.885).

The framework is also unable to demonstrate the process by which Cou people regard history in life and use the past to interpret the present (S.-S. Wang, 1997). That is, when Shanmei adopted tourism as a new livelihood strategy (activities), the kinds of institutional processes and organizational structures that have been mediators have enabled the majority of Shanmei residents to create a new identity based on traditional knowledge, incorporating it into their daily life. How things have been done in the past and the relationship of Gu fish or fishing practices to the ancestors influence the meaning and value of Gu fish. As the Chashan case illustrates, if only a small proportion of people in the village identify with tourism, it cannot take root in the Cou community which operates by consensus. Therefore, even though the tourism types and activities are different in the two villages, their system of values or world views and institutions are similar: a collective orientation to life. Culture, here, can be defined as “a fairly stable set of taken for granted assumptions, meanings and values that form a backdrop for action” (Smircich, 1985, p.58). This definition reminds us that we observe actions or behaviours, not values. They are connected because values are generally held beliefs that define what is preferable in influencing behaviour. At the heart of all these views on culture is the notion that value systems have consequences for the structuring and functioning of institutions and organizations and the behaviour of individuals within them (Chapman, McCaskill & Newhouse, 1991). In this sense, the framework is expanded to include culture, which includes, for example, beliefs, traditions, identity, language, sacred sites, ceremonies and festivals. Other aspects that are linked to culture may include a strong social network as social capital derived from the clan system which supports all livelihood

strategies by the practices of reciprocity, redistribution, and exchange, as well as the value of attachment to land. These cultural assets may not have direct economic value but they are centrally important in people's lives, choices and well-being.

It is inappropriate to try to fit these aspects of culture, identity, and values into an "assets" or "capital" framework. As Hebinck and Bourdillon (2002 p.6) indicated, the livelihoods framework places an over-reliance on the notion of "capital," because of the over-emphasis that this places on the material aspects of people's lives:

"One of the problems is that it is an economic metaphor that does not do justice to the nature of people's activities, which are not entirely oriented towards material gain. Although material gains are a very important aim in the notion of livelihood. 'livelihood' does not span only the commoditized world and associated values. The term also incorporates the non-commoditized, non-material, and cultural part of life and sets of values that are embedded in local cultural repertoires."

They also draw on Long's (2001) work on knowledge to critique its inclusion in the conceptualization as part of "human capital" because, as such, it implies that knowledge is a universal, culturally-neutral resource that can be assessed as a commodity, rather than recognized as a social construct or a relationship that is redefined within a local context.

The concept of the cultural economy in Ray's papers provides a different perspective on culture. The cultural economy is not only a form of industrial production and a style of living, but also an important strategy for local or regional (re)development (Liang and Chang, 2004; Ray, 1998, 1999). Both villages adopt cultural markers as key resources in the pursuit of territorial development objectives. Tourism was used as a form of endogenous development in which economic activity was re-generated based more firmly on local resources, both physical and human. Ray (1998) sees local cultural resources as the key to improving the social and economic well-being of such rural areas.

7.6.2 Power and Power Relationships

Also missing from the framework are notions of power and power relationships and, in particular, the link between endogenous and exogenous factors.

An endogenous factor - Cou traditional social structure and clan system

Lack of political power or not being closely associated with certain individuals who belong to certain influential families with abundant resources usually means limited accesses to cash-earning opportunities. For example, the Board of Directors (including the Chair) of Shanmei Community Development Association hold many resource obtained from outside the community. Before the *Fona* (vitality bean) Festival was held for the first time in Leye, groups from each Cou village went to Leye to conduct construction work and were paid by Alishan National Scenic Area Administration. The majority of the group from Shanmei consisted of the Chair of the Board of Directors, an Alishan Township's people's representative and the Board of Directors. People were selected not only for their construction skills but also for their positions. From 1993 when Shanmei Community Development Association was first established, only two persons have been elected as the Chair of the board of Directors. The reason for this may be, as S.-S. Wang (1995) stated, the Cou emphasize collective values coming from the principle of the "central-branch" in the Cou's social structure, which encourages the formation of collective forces. Individual performance is relatively less emphasized. As a result, under the prerequisite of stability and cooperation, when stepping into the electoral system of modern society, it is common to continue to hold office through re-election and the traditional social structure tends to support the power structure that is in existence. It is difficult to see where ethnic group-based power dynamics or conflicts are to be placed within the sustainable livelihood framework.

Exogenous factors

The two villages greatly rely on welfare and subsidies from the government. Power relations in the villages are influenced by various government organizations that have different goals and measures of local development that are implemented through various projects and funding opportunities. The resources are closely linked to power relations that are embedded in a matrix of formal and informal institutions and organizations within the villages. Institutional aspects of power can be captured through the institutional processes and organizational structures and social capital dimensions of the framework, and empowerment can be identified among livelihood outcomes. However, the dynamic link between external resources with internal power relationships is not clearly reflected in the framework (Adato & Meinzen-Dick, 2002).

More generally, the framework diagram suggests a snapshot approach when, in fact, it should be seen as dynamic. Livelihood strategies, vulnerability factors, asset portfolios, and institutional process and organizational structures are often in a state of flux, so it is necessary to use the framework in a way that incorporates a temporal dimension.

The above critiques have been addressed by including these additional perspectives wherever they have been deemed to be relevant. Thus, use of the sustainable livelihoods framework does not have to be limiting; it is simply not sufficient on its own for pointing to all possible factors relevant to a study. It must be used in conjunction with concepts, tools, and modes of analysis that have long been used in other fields, such as anthropology and development sociology.

The framework does not explicitly address the differential conditions, assets and strategies of socially different groups. Therefore, additional attention must be given to the implications of gender, ethnicity, age, or other types of social differentiation. Livelihoods analysis in this study emphasizes the level of the individual, which is supported by the household. Future research should pay additional attention to the household level, because it will help in the understanding of the influence of family relations and the Cou sub-clan system in people's livelihood choices.

7.6.3 Key Adaptation of Sustainable Livelihood Framework

Based on the results of the research, several key adaptations are made to Scoones' framework (as shown in Section 2.4.4). Firstly, culture, in this case Cou culture as the focal point of the study, guides institutional processes and organizational structures and is added into the revised framework. From a broader perspective, the whole diagram is embedded in culture because the various cultures provide the context in which the Cou operate. As mentioned in previous chapters, various forces of modernization have impinged on the Cou from outside, including Christian churches, as well as the colonial activities of the Japanese and the Han.

The influence of the transforming structures and processes extends throughout the framework. As indicated in the framework, they have a profound **influence** on **access to assets**. They: (a) create assets and determine the terms of exchange between different types of capital e.g., income (financial capital) generated from the park is invested in basic infrastructure (physical capital) and various education classes (human capital); and (b)

determine access e.g., ownership rights of the park, and institutions regulating access to common resources. They also effectively determine **access** to livelihood strategies. Moreover, there is a direct impact on *livelihood outcomes*. Responsive organizational structures use the collective income to implement social services in Shanmei. The services have increased villagers' sense of well-being, promoted a sense of self-control, and reduced vulnerability through the provision of social safety nets.

Direct feedback also exists to the *vulnerability context*. Such *institutional processes* (e.g., management of common property resources) of tourism development, implemented through *structures* (e.g., decision-making procedures, benefit-sharing system), can help cushion the vulnerabilities (e.g., uncertainty caused by tourism seasonality). Furthermore, through the benefit-sharing system, financial capital (i.e., the collective income as one major *livelihood outcomes*) is transformed into different forms of capitals and strengthens the community asset base (i.e., *livelihood resources*). The feedback relationship between *livelihood outcomes and livelihood resources* is also added in the framework.

Secondly, tourism is added into the framework as a form of *livelihood diversification* into the non-primary, service economic sector. Thirdly, with the Taiwan economy shifting towards a service- and high-tech-based economy, tourism, in the form of leisure agriculture, contributes to *agricultural diversification*, rather than agricultural intensification – extensification as described in Scoones's paper (1998).

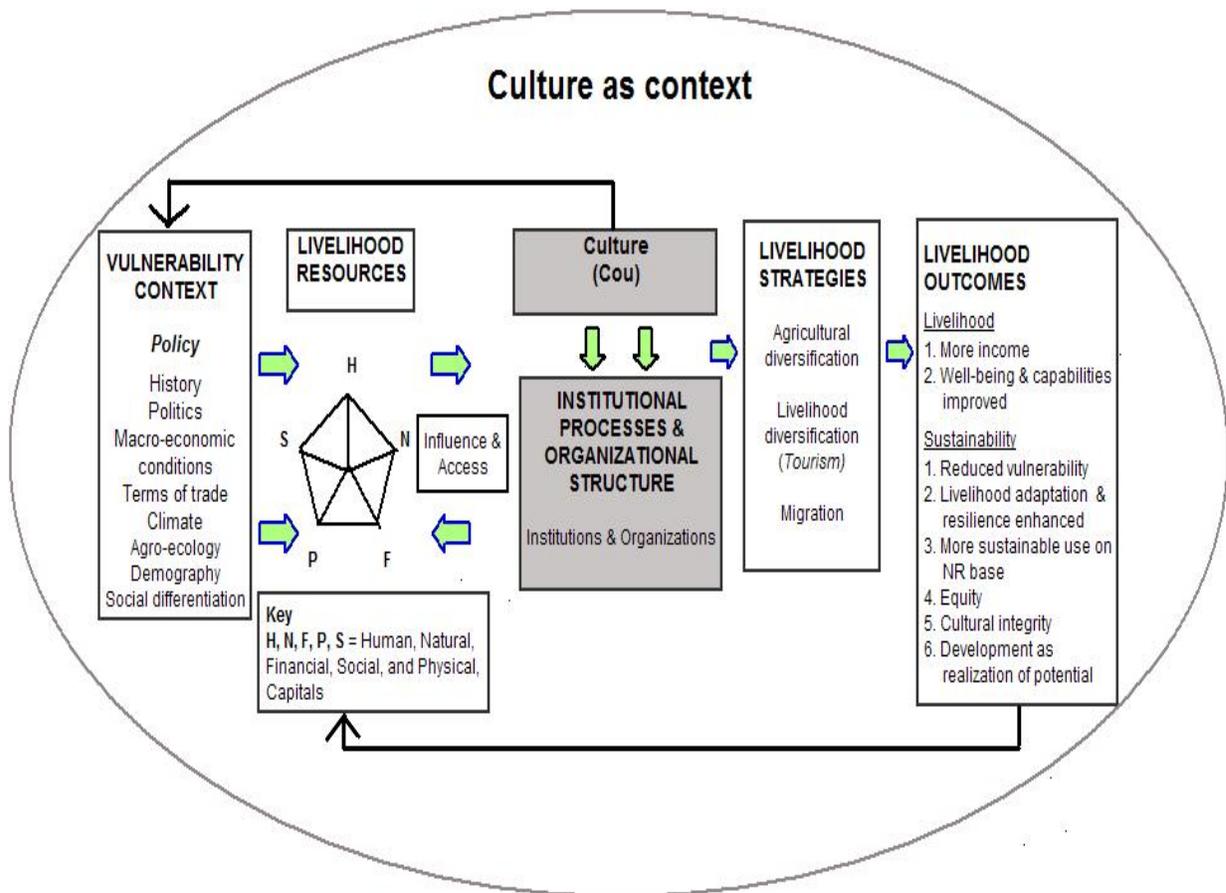


Figure 7-2: Sustainable Livelihoods Conceptual Framework with Tourism

Source: Adapted from DFID (2001) and Scoones (1998)

7.7 Theoretical Implication: Strengths of the Sustainable Livelihood Framework

To Tourism Literature

Tourism is a relatively recent activity. With risky characteristics, it so far has not replaced other economic activities, at least in the remote indigenous villages in Taiwan as demonstrated in both case studies. Tourism should not be viewed in these marginal areas in isolation. It goes on within contexts. The focus of advocates of sustainable tourism should not be on maintaining tourism over an indefinite period but on the exploration of how it can fit into complex livelihood activities and possibly contribute to sustainable livelihood outcomes. The approach taken in this study is different from that reported in the majority of tourism literature

which only focus on tourism. Therefore, tourism should not be considered as a panacea for all of the problems in indigenous communities. Perhaps the fact that not every person is involved in tourism is advantageous because it is rather risky. Tourism, in combination with other economic activities, may disperse the risk.

The strengths of the sustainable livelihood framework when incorporating tourism is that it encourages the adoption of a broader perspective to examine consequences of tourism in different aspects of aboriginal people's lives. Even though not every villager conducts tourism activities, the majority of people, of Shanmei in particular, have links to tourism one way or the other, whether directly or indirectly, so it enhances their well-being although there are associated costs. Tourism has diversified the economic base of both villages, but it is a fragile component of the economy because of its seasonality and susceptibility to hazards. So it is not, at least right now, the saviour of the economy and culture. But it does allow some economic benefits and supplements to be obtained, and it promotes local specialties. It does draw partially on culture and uses local resources. It also illustrates the nexus of macro-economic and micro-economic conditions through local responses to extra-local forces. More practically, questions are raised concerning the local institutional processes and organizational structures through which the positive outcomes of tourism be increased and the negative ones reduced, that can be used to change and shape the contexts in which people try to make a living, and to improve the social and cultural well-being of rural areas.

The framework (Figure 7-2) helps to encourage an improved understanding of tourism that goes beyond income generation, to consider the many other factors that indigenous people in different contexts define as contributing to their vulnerability or well-being. Contexts vary enormously, as do development processes. These processes are locally specific, shaped by history, cultural repertoires, economic and political relationships and the natural environment. Livelihood is essentially contextual (Hebinck and Bourdillon, 2001).

Last, but not the least, the sustainable developments approach is a people-centred paradigm and the methods that are used to implement it facilitate the adoption of an indigenous perspective. It has been employed here to understand indigenous views and responses concerning the changes induced by tourism development.

CHAPTER 8

CONCLUSIONS AND IMPLICATIONS

8.1 Introduction

The goal of this research was to assess the utility of the sustainable livelihoods framework (Figure 2-3 in Section 2.4.4) for examining and assessing the implications of the introduction of a new activity (i.e. tourism) in indigenous communities. The examination of the evolution of livelihood strategies is the main focus of the study. The research has been undertaken predominantly through comparative case studies using qualitative research methods. Seven research objectives, presented in Chapter 1, constituted the objectives that were established for the research:

1. To identify different livelihood pathways over different time-scales by using an historical approach for analysis;
2. To identify how and why tourism development has been introduced;
3. To develop an overall understanding of how people support their livelihoods (by investigating the livelihoods of the two indigenous communities);
4. To examine if and how tourism has been incorporated into the livelihoods.
5. To examine the extent to which tourism development-related initiatives, planning and management have been experienced by different stakeholders (stakeholder groups) as positive (opportunities, benefits, and /or advantages), negative (threats, costs, and /or disadvantages) or neutral;
6. To explore whether the livelihood outcomes are sustainable and in what context and form, tourism might contribute to sustainability.

Objective 1 was addressed in Chapter 4 through 6 in which it is described and explained that Cou traditional livelihoods and their traditional social structure have been closely linked. The Cou self-sustaining livelihoods that have lasted for thousands of years were changed dramatically by the assimilation policies of the two colonial regimes in the past hundred years and linked increasingly into the global economic market system. Livelihood activities and strategies have shifted from traditional slash and burn agriculture, fishing and hunting to the present cultivation of paddy fields, cash crops, the undertaking of casual labour and migration

in search of economic opportunities. The marginalized economical, political, and geographical conditions of aboriginal people have made it difficult for them to compete with the mainstream society economically. Yet, in recent years, the promotion of tourism development and cultural industries by the government has provided aboriginal people with a new opportunity (tourism) in which they can make use of their culture as an advantage (culture as an attraction) to possibly reverse the inferior position.

Objective 2 was also discussed in detail in Chapters 4 through 6. Chapter 4 provided a broad discussion of the Alishan area where Cou tribe resides. In recent years the area has witnessed increased tourism development. Chapter 5 and 6 provide detailed information on the process and reasons for tourism development in Shanmei and Chashan. The Cou tribe and its culture have been advertised as one of the main touristic attractions in the region. In addition, with the Taiwan economy shifting towards a service- and high-tech-based economy, the traditional agriculture, forestry and fishery industries have all been in decline. External influences, such as the increasing competition from agricultural products from other East Asian countries with cheap labour, and internal influences, such as the lack of funds, skilled management and administration personnel for running the processing factories to produce agricultural products, have forced many villagers to look for a second income. This context has been important in encouraging the turn to tourism. The abundant, high quality landscape resource in Shanmei was considered to be a potential major attraction for tourism and the idea of restoration of Gu fish in the Danayigu River was put forward for tourism development. The action of river protection failed in Chashan, and promoting the village as a tribal park with pavilions as symbols of the spirit of sharing were used as attractions. The previous village head of each village has enabled local residents to innovate “traditional” knowledge and to generate new identifications, enabling tourism activities to be produced or grown from within rather than derived or developed from outside. Filling the new economic activities with meaning and the spirit of “traditional” knowledge has increased their endogenous strength and facilitated local control of development. By using their significant status in the Presbyterian churches, SB001 and CA001 put their ideas into practice by exercising the social relations (important social capital) of the unofficial church organizations.

Objective 3 through 6 were considered in the context of the two research sites (i.e., chapter 5 and 6). Livelihood activities were separated into three categories: tourism activities,

activities indirectly related to tourism and non-tourism activities. People employ a wide range of resources and livelihoods strategies to support themselves, including migration, wage employment (regular and occasional), crop production, livestock, harvesting mountain resources for subsistence and cash, fishing and hunting. Tourism has been incorporated into the livelihoods of both villages in forms of employment (regular and occasional) and various collective and self-owned enterprises (e.g., restaurants, homestays, café, food stalls, handicraft stores and campsites). Analyses of how tourism complements or competes with other activities in terms of the use of land, water, and time and the discussion of the benefits and costs of each tourism activity experienced by different stakeholder groups (mainly by age and gender) with different personal situations fulfilled objective 4, examining how tourism has been incorporated into livelihoods, and objective 5, accessing the extent to which tourism development-related initiatives, planning and management have been experienced by different stakeholders (stakeholder groups) as positive (opportunities, benefits, and /or advantages), negative (threats, costs, and /or disadvantages) or neutral.

The comparison of the two cases in chapter 7 generated insights for objectives 6. The sustainable livelihoods framework was examined and used to assess the implications of the introduction of tourism in the indigenous communities. In particular, the context and forms in which tourism might contribute to sustainable livelihood outcomes were examined. Institutional processes and organizational structures are one main factor determining whether different assets, tangible and intangible, are accumulated or depleted on individual, household, and community scales. The case of Shanmei revealed that the efficient operation of Danayigu Ecological Park and Shanmei Community Development Association have enabled tourism to diversify the local economy, supporting multiple livelihood strategies, providing social services, empowering the community and generating cultural benefits. The comparison of the two cases revealed that, in the context of a capitalist market economy in which people pursue maximization of individual interests, the operation of tourism enterprises through institutions with a communal mechanism, such as collective action, cooperation, common property resources management, and through efficient operation of the communities' organizations based on collective knowledge guided by Cou culture, is most likely to lead to sustainable outcomes (socio-culturally, economically, and environmentally) in the context of indigenous communities.

The findings will be amplified and presented on three levels. Section 8.2 reviews the results as they relate to the two case study areas. Section 8.3 places the findings derived from the two study sites into the broader context of Cou people and, more generally, aboriginal people in Taiwan and suggests directions for future research. Section 8.4 presents theoretical contributions and practical implications of the research. It does this through addressing the utility of the sustainable livelihood framework, and the implications of the research for sustainable development, tourism and indigenous people. Section 8.5 is a summary of the chapter that describes the main contributions of the research.

8.2 Research Results as they Relate to the Two Case Study Areas

8.2.1 Shanmei

In Shanmei, successful protection of the Danayigu River was achieved by applying traditional knowledge leading to the development of Danayigu Ecological Park. This park has become a major tourism attraction. Income generated from the park has been used by Shanmei Community Development Association to create employment and cash earnings and to support various welfare programs. Community empowerment has been enhanced through the development and operation of the park. Although community resources are controlled by a small number of people, under the organization and accompanied institutions that reflect the Cou spirit of sharing and collective action, tourism, as one of many livelihood strategies, has improved local livelihoods and contributed to the overall sustainability of local livelihoods.

After nearly 20 years of development, almost every household in Shanmei has a connection to the park and an increasing number of local livelihood activities are directly or indirectly related to tourism. A high degree of local involvement and relatively fair benefit sharing are main reasons for local people continuing to support river protection. Yet, livelihood activities in tourism only occupy up to one third of the whole spectrum of economic activities, behind migration to seek economic opportunities and employment primarily by undertaking casual labour. Furthermore, the contribution of tourism has been extremely unstable due to seasonality and the vicissitudes of natural hazards. Most households rely on a combination of activities to meet their needs and to disperse risk. Tourism is viewed as being an additional activity that can be combined with existing livelihood activities and not as a

substitute for them. As the community has been drawn increasingly into the broader market economy, households in Shanmei have had increasing needs for cash and tourism is undertaken primarily to generate cash rather than as a subsistence activity. This is important because the cash-earning opportunities that exist in the mountains are limited.

Livelihoods

Tourism activities have the potential both to complement and to compete with other economic activities in various forms. For example, some households that own tea plantations converted small parcels of land to pick-your-own orchards as a tourist attraction in order to make money by selling fruits. Surplus crops and livestock are supplied to tourism enterprises inside and outside of the park to generate cash and, in turn, to stimulate crop production. Possible conflicts between tourism-related activities and other activities may not be obvious in terms of the use of land, water, capital, and time.

Positions and opportunities for cash earning that are generated inside the park are available close to home and are particularly beneficial for mothers and single parents with young children, the disabled, unemployed, elders and women. Unlike the sale of agricultural products which must be cultivated, income from tourism activities is more immediate. Households that rely mainly on tourism-related activities pursue more than one source of income to disperse the risks. In addition to cash-earning livelihood activities, the intangible benefits generated through tourism vary, depending upon the type of activity and enterprise. These benefits include contributing to multiple-livelihood strategies, fitting into current life styles, providing new livelihood options, maintaining farming and harvesting activities, possessing low labour demand compared to agricultural and hunting activities, creating several small markets to sell local products, and being compatible with the responsibilities of women who conduct domestic work. Overall, tourism in Shanmei provides new opportunities for *livelihood diversification* as indicated in Figure 7-2 (Section 7.6.3) and a foundation for further development. Costs associated with livelihood activities in tourism usually occur when large loans are secured to invest in tourism infrastructure on a relatively large scale (e.g., lodges) by people whose livelihoods come to rely mainly on tourism.

Community empowerment

Intangible benefits that are generated from tourism include adaptation and development of institutions for common property resources management and for bottom-up development, the enhancement of community identity and social cohesion, the increase of women's participation in decision-making and their empowerment, acquisition by villagers of new skills and confidence, enhanced capability to dealing with outsiders, and cultural benefits through the reinvigoration and sharing of aspects of culture.

8.2.2 Chashan

Similar to Shanmei, in the context of declining agricultural and forestry industries, the growth of tourism and enhanced interest in aboriginal culture in the larger society, some Chashan villagers began to think about attracting visitors to experience the local natural landscape and resources. Tourism in Chashan was undertaken primarily through the promotion of Chashan as a tribal park with pavilions, which represents the Cou cultural attribute of sharing, as the major attraction.

In an attempt to have the majority of villagers (mainly farmers) benefit from tourism, Chashan Leisure Agricultural Area was established in an attempt to steer the traditional practice of agriculture into a combination of agriculture with travel and education. In this way, it was hoped that abandoned farmland could be put into different uses again. More specifically, it was hoped that agricultural production, a primary economic activity, could be upgraded to a secondary, tertiary or even a quaternary economic activity through the provision of services, i.e., tourism. Strategic alliances were created so that tourism-related businesses and supporting services could be co-ordinated to increase the level of involvement and to expand the range of benefit-sharing. Due to a number of internal and external challenges described in chapter 6, the attempts have not been successful.

As in Shanmei, most households rely on a combination of activities to meet their needs and to disperse risk. A wide range of resources and livelihood strategies is employed by Chashan households: wage employment (regular and occasional), migration, crop production, livestock husbandry, harvesting of trees, plants and mountain resources, fishing, hunting and tourism enterprises. The development of homestay /guesthouse businesses has created opportunities to make cash earnings, yet livelihood activities in tourism only occupy less than

one fifth of the spectrum of economic activities, after casual labour, farming and harvesting for cash, and migration. This means that only a small proportion of villagers has benefited from tourism.

Livelihoods

Similar to Shanmei, tourism activities in Chashan have potential to complement and compete with other economic activities. For example, local crops are made into different dishes and sold in homestays, restaurants and eateries. Barrels and packages of processed bamboo shoots are sold to tourists directly. In this way, the producers are not exploited by middlemen. Some households that run homestays obtain full occupancy when they use orchards as an attraction and let tourists pick plums for cash. Surplus crops and livestock are supplied to homestays to generate cash and this, in turn, stimulates crop production.

Opportunities to participate in tourism are distributed very unevenly across Chashan. Within the community, those with strong financial capital, belonging to certain affiliations and with relevant skills, have more opportunities. Homestay businesses are regarded as a sideline in Chashan as little time and effort is expended and little income is generated. Reasons for becoming involved in the business vary and have been described in detail in chapter 6, but the majority of the households indicated that cash earnings are not the main reason for their involvement. Homestay proprietors with the most regular income have a better business because they are able to invest in the improvement of the accommodation and provide better service to meet visitors' expectations. They have gradually separated themselves from the strategic alliances and, as a result, collaboration between different households has decreased progressively due to the lack of appropriate institutional arrangements. The homestay business in Chashan does not make a significant contribution to the livelihoods of the poorest people. Tourist-oriented arrangements and the homestay business have not been fully incorporated into local lives and work.

Benefits from the homestay business include cash, maintenance of raw material supply, stimulation of crop production, development of new skills, creation of new markets and sales channels, blending in with and supporting multiple livelihood strategies, and accumulating physical and economic capital as means for further production. As in Shanmei, disadvantages generated from livelihood activities in tourism occur when those who have secured substantial

loans to invest in tourism infrastructure on a relatively large scale (i.e., lodges) have their livelihoods mainly rely on tourism.

By using a historical approach to chronicle the evolution of livelihood strategies in Shanmei and Chashan, different livelihood pathways taken by members of the Cou tribe have been documented over different time scales in chapter 4, 5 and 6. An understanding of how those in both villages sustain themselves has provided the context for an examination of how tourism has been incorporated into their livelihoods. The extent to which tourism initiatives, planning and management have been experienced as positive or negative has also been examined. In chapter 7, each component of the sustainable livelihood framework (Figure 7-2 in Section 7.6.3) was examined through a comparison of the two cases. Both Shanmei and Chashan have adopted tourism as one of their livelihood strategies, but different institutional processes and organizational structures have led to different livelihood outcomes and have influenced whether feedback relations exist between livelihood assets and outcomes. The problems in Chashan originated from a lack of complete institutional arrangements that cause the original sharing mechanism to decrease progressively in effectiveness. The formation and operation of institutions and organizations have been guided by Cou culture. As a result, a cultural component, which was missing in the original formulation, has been added to the framework (Figure 7-2 in Section 7.6.3).

8.3 Findings Applied to Broader Themes of Cou and Aboriginal People in Taiwan and Implications for Future Research

The comparison of the two cases reveals several themes that are relevant to economic development in tribal communities in Taiwan. Four points can be made concerning the engagement of the tribal culture with the market economy through tourism: 1) Tourism, based on culture (e.g., traditional rituals and ceremonies, performances) and hot springs, supported with homestays, can become a major industry reflecting the tribes' potential advantages for economic development; 2) Tourism, as a livelihood strategy, can be implemented through organizations and institutions, such as common property resources, cooperation and collective action, that reflect the characteristics of local culture in a collective society; and 3) access to and use of external funds currently underpin the tribal economy; and 4) economic development through tourism based on local culture (e.g., singing and dancing, and local foodstuffs) is a

hallmark of a cultural economy (S.-S. Wang, 2003). In other words, the concept of culture as viewed here transcends a perspective on culture as tradition and involving the protection of cultural heritage, but regards culture as a resource that can be harnessed to revive the local economy (Council for Cultural Affairs, 1998). Ray (1998) describes that the culture economy approach to rural development is the attempt by rural areas to localize economic control to revalorize place through its culture identity. The idea is primarily concerned with the production side: that is, the territory, its cultural system and the network of actors that construct a set of resources to be employed in the pursuit of the interests of the territory (Ray, 1998 p.4). The research examines the concept of tribal “place” and elements of cultural economy that work within both Cou communities. The elements include coping strategies of social capital such as identity, social relation, and innovation.

It would be useful to apply the sustainable livelihood framework to different tribes and in different locations in Taiwan to see if the findings generated for the Cou tribe are of wider applicability.

8.4 Theoretical Contributions, Practical Implications, and Directions for Future Research

8.4.1 Utility of the Sustainable Livelihood Framework

The contribution of this thesis and the utility of the sustainable livelihood framework will now be described as they pertain to three domains: tourism, sustainable development and aboriginal people.

Tourism

Most studies of tourism only consider tourism. Nonetheless, tourism takes place in communities, particularly in aboriginal communities, which have multiple activities. The sources of income are varied so tourism should be seen in this context as potentially competing with and complementary to other activities. It is best considered as a means of diversifying the economy and not as a replacement of existing economic activities. This diversification takes place at individual, household and at community levels. The sustainable livelihood framework and its components facilitate the analysis of the role of tourism because the complexity of

situations is recognized, particularly the circumstances of marginalized people that sustain themselves from multiple livelihood resources.

There is a considerable academic literature on sustainable development and tourism but the notion of sustainable livelihoods is relatively new to the tourism literature. The sustainable livelihood framework (Figure 7-2) is particularly useful in forcing the consideration of tourism in a broader context. It has been useful as a framework that has been used to guide this study: most of the components in the sustainable livelihood framework have been found to be relevant.

Sustainable development

The findings of this research show that sustainable livelihood thinking can be used as an analytical and practical tool for guiding studies of environment and development. It implies that sustainable development can only be achieved through giving priority to the needs, interests and priorities of the poor and marginalized communities (Chamber, 1986).

Sustainable livelihood thinking is a means of integrating three modes of thinking: environmental thinking which stresses sustainability, development thinking which stresses production and growth, and livelihood thinking which stresses sustenance for the poor (Chamber, 1986). “Livelihoods” is a more tangible concept than “development”. It involves an assessment of community assets, adaptive strategies and technologies that contribute to livelihood systems. The approach acknowledges that communities are both subjects and objects of change and that they have much knowledge about their own situation and can draw strength from this. It puts a strong emphasis on questions of economic and environmental sustainability, the social well-being of people, governance and policy, as well as the linkages between them (International Institute for Sustainable Development, 1999). It supports empowerment rather than welfare, endorses improvement of the productivity of existing livelihood systems as well as the creation of new opportunities.

The role of culture has not often been given adequate attention in the literature on sustainable development. The study of tourism development in the two indigenous communities shows that culture is potentially an attraction and that culture has many implications for the way things are done and for the distribution of benefits. Therefore, the definition of culture is dynamic rather than in historical reposition.

Aboriginal people

This study reveals that the sustainable livelihoods approach facilitates examination of the reality of aboriginal people and poor people in rural and remote areas. The framework also encourages understanding of the perspectives of aboriginal people because it is a people-centred paradigm that emphasizes the inherent capacities and knowledge system of local people. The application of the framework in this investigation has shown that tourism has been chosen as one important livelihood strategy in both case study communities. It also shows that their culture and surrounding environment have become assets to attract tourists and to generate cash earnings, particularly in a situation in which there are not many employment opportunities in mountain areas.

The approach focuses on the local impacts of change, recognizes the complexity of people's lives, acknowledges that people have different and sometimes complex livelihood strategies and addresses benefits that are defined by the marginalized communities themselves. It acknowledges the dynamism of the factors that influence livelihoods: it recognizes that change occurs and people accommodate, learn from change and plan, adapt and respond to change. It focuses on accommodating traditional knowledge and skills to create conditions for marginalized communities to enhance their well-being.

The sustainable livelihood approach assists in understanding that traditional knowledge and its innovation provide a basis for the development of coping mechanisms and adaptive strategies to buffer the forces which threaten livelihoods. It also provides a different perspective on the linkages between culture, environment and development that might be used to enhance the management of natural resources.

8.4.2 Weaknesses of the Sustainable Livelihood Framework

Although a general framework exists with a number of components that are useful for organizing thinking and information, several significant components are not identified in the original framework. Both case studies reveal that the roles of particular individuals are extremely important. Culture is also important in the ways that it adapts to and guides new organizations and institutions. For example, the Presbyterian churches have been and are extremely influential in the case study communities. From one perspective, they are external forces because they have come from outside and were introduced, even imposed, on Cou

culture. On the other hand, they have existed in the communities for more than 50 years and have become important sources of social capital. They are fundamental to the way that the societies work now. They have become embedded in local community and can now be viewed as being part of local culture and community. This is one example of cultural change. Culture also serves as a broader context in which the whole diagram is embedded. The role of culture is so important that it requires careful attention and further assessment. The new diagram emphasizes the great importance of culture but, ultimately, the position of culture may require further refinement and careful consideration in future research.

Certain aspects of the framework have received greater prominence than others in this thesis, particularly institutional processes and organizational structures, and types of tourism. Furthermore, some items, such as the concept of cultural economy, the role of individuals (which has been inserted under institutional factors), and the role of culture in guiding institutional processes and transforming organizational structures have been added. Ray's framework of cultural economy is a useful complement or supplement to that on sustainable livelihoods.

8.4.3 Directions for Future Research

The results of the research reveal that consequences of different tourism activities affect different stakeholder groups within the villages, highlighting the need to conduct in-depth stakeholder analysis to identify how the interest of each stakeholder group differs from that of the others. For example, homestay business is particularly beneficial to women with young children compared to other economic activities because they can devote more time to childcare. For each case study the most useful way to specify stakeholder groups is likely different. From the results of the two case studies in the research, it is useful to distinguish specific interest groups by their:

- *Degree* of involvement in tourism activities (e.g., households whose livelihoods mainly rely on tourism related activities differ from those whose livelihoods consist of a variety of livelihood activities)
- *Type* of involvement (e.g., the owners of the handicraft stores in Danayigu Park have specific interests, different to those of food stands)

- Role in *decision-making* (e.g., members of Chashan Leisure Agriculture Area led by the previous village head are a specific sub-group in Chashan)
- Other *influence* on the tourism related enterprises (e.g., funding provided by different government organizations).

It is also important to distinguish between people according to their livelihood needs/strategies, rather than the nature of their involvement. In both case studies, residents have different stakes according *gender*, *socio-economic* status (rich/secure, poor), *age*, and *location*. The differences between stakeholder groups might not be in what they *do* or *receive* from the enterprise, but in the *significance* of that to them, because they have different priority and livelihood strategies. For example, the fact that homestay business is done at home provides benefits to some extent for all business proprietors, but it is particularly significant for *women* who generally have to combine income-earning with domestic duties. The fact that earnings from homestay business are extremely unstable is true for all business runners, but is a particular cost and barrier to the poor, who can least afford to invest in risks.

The research also reveals that consequences of tourism related activities also affect non-participating residents. For example, homestay proprietors seem to benefit the most from overall development of Chashan and the business has created tension and jealousy between beneficiaries and non-beneficiaries, which undermines social networks. Future research should examine tourism impacts on non-participating residents and how conflicts between participants and non-participants can be reduced and common interests can be increased.

The study proved that the framework is a useful analytical tool that provides a more comprehensive understanding of consequences of tourism. Under the context of indigenous tourism, culture appears to be the most important component. Future tourism research can use the framework with different types of tourism and to identify in different contexts, what component(s) in the framework are most important and how positive development impacts can be expanded and negative ones can be reduced from different stakeholders' perspectives. The implications contribute to the question "how interventions (e.g., policies, NGO's missions) can be better tailored to enhance livelihoods.

8.5 Summary

Development is multi-faceted. Tourism may be a development option but it is not a panacea for all of the problems that indigenous communities face. Culture and cultural sensitivity should be important in the development process. Furthermore, if introduced, it will need to fit into an existing system. While there is a substantial literature on tourism and sustainable development (Butler, 1993; Telfer, 1996, 2002; Wall, 1993a; 2002; World Tourism Organization, 1996) and sustainable tourism (Butler, 1998, 1999; Clarke, 1997; Hunter, 1995; McMinn, 1997; Stabler, 1997; Wheeler, 1993), this is one of the first studies in tourism to employ the concept of sustainable livelihoods and to emphasize that tourism should be understood in the broader economic and cultural context in which it takes place. This is also the only study that the author is aware of that has adopted a comparative approach to the study of tourism in one indigenous tribe in Taiwan. The comparison has led to a deeper understanding of culture (i.e., world view, values).

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APPENDIX A A GENERAL INTERVIEW GUIDE

A. Develop an understanding of local livelihoods (Ashley *et al.*, 1999)

- *A descriptive overview* of the livelihoods of different groups. What outcomes do people achieve? What activities do they pursue? What assets do they have? How do external forces shape their option, and can they shape external forces? What are the underlying priorities and preferences that shape household livelihood strategies?

Example questions: What do you do to make living? What activities do you do and why, which are most important, which are most preferable? What do you do in difficult times, in what order of preference? What is changing and why?

- *Dynamics and processes of change.* How and why are livelihoods changing? What is due to shocks or externally driven trends? What changes are short-term ‘coping’ strategies, and what are long-term ‘adaptive’ strategies (adapting to either new opportunities or constrains).

Example questions: Has this changed over the past few years? Do men have side occupations or other productive activities? Do women? Do children? Are there non-customary environmental use and management laws, regulations, or policies which affect your communities? What are they? Why were they created? Who develop them?

- *Normative:* What improvements do people most want? What outcomes, assets or activities? What changes in the external environment would help? What criteria do they use when judging options?

Example questions: What are you trying to achieve through your activities. The answers are likely to include increased well being (good health, education), more income, more sustainable use of the natural resource based.

- The comparative *significance* of different activities in contributing to needs, assets, and priority. The key components of livelihood security.

Comments: more in-depth information. Questions will be further developed once the overall understanding of livelihood activities is established.

- *Stakeholder* groups and differences in livelihood strategies and priorities

Comments: possibly men/woman, senior/adult and also depend on the type and level of involvement in tourism enterprise.

B. Consequences of the tourism enterprise on livelihoods (Ashley *et al.*, 1999)

Some consequences involve a *change* in situation or outcome will require information on livelihoods *before* the operation of the enterprise and a comparison of before and after. Other consequences will not be in the form of observable change, but will occur as a *contribution to* (e.g. risk-aversion strategies) or *pressure on* (e.g. natural resources). During the analysis, the various consequences can be categorised using the elements of the livelihoods framework:

- *Direct contribution to outcomes:* How does the enterprise contribute directly to needs and improved livelihood outcomes e.g. cash, food, physical security, empowerment, sustainability? How significant is the contribution compared to other sources e.g. how do cash earnings compare with other sources of cash? What is the value in terms of what can be bought? Does the timing (seasonality) enhance the value or not?
- *Consequences on assets:* Does the enterprise affect access to natural, physical and financial assets, or change their quality or productivity? If natural resources are used, are they used sustainably? Apart from direct impacts, are natural resources affected by the enterprise? Does it change access to social networks of households or of the broader community? Does it strengthen or undermine community co-operation and institutions, particularly institutions for common property resource management? Does it change the community's relations with outside world, in terms of influence, co-operation or conflict? Are cash earnings invested in human capital (education, health) or other reserves (financial, physical assets)? Are skills acquired that enhance human capital? Are assets used up in the enterprise activity?
- *Conflicts and complementarities with other activities:* Is time spent on this enterprise taken away from other activities? Does seasonality conflict or complement? Is there competition for inputs (e.g. land, resources) between the tourism enterprise and other activities (i.e. what is the opportunity cost)? Does it develop complementary skills, assets, markets? Does it damage other activities?
- *'Fit' with livelihood strategies and priorities:* Does the enterprise match the strategies that people use when selecting and combining activities e.g. minimising risk, diversifying, keeping assets liquid, maintaining flexibility?
- *External influences: organizations and institutions:* Does the enterprise affect any of the external forces – organizations, institutions, policies markets, and social norms - that influence local livelihoods? Does it change policies or behaviour of others towards local residents? Does it change local people's access to institutions and their influence over them? Does it change local people's access to institutions and their influence over them?
- *Relevance to the context:* The context itself is unlikely to change, but does the enterprise change people's ability to cope with shocks or capitalize on positive trends? Does it help people 'cope' with temporary change, or 'adapt' to a permanent one? How does it relate to long-term trends – does it counter them or amplify them?

- *Consequences on the links between the components:* Does the enterprise affect how households invest their incomes into assets, or how external institutions influence household opportunities? Does it change the underlying household priorities that shape the livelihoods framework?
- *Short-term and long-term consequences:* Which impacts are short-term, which are long-term, and which merely hoped for?
- *Consequences on sustainability:* Does the enterprise affect the sustainability of the natural resource base? Is the activity financially sustainable? Are people more or less dependent on outsiders? If dependent, is the outsiders' role sustainable in the long-term?
- *Differences between stakeholders:* In each case, *who* is affected needs to be determined, and the overall consequences for different stakeholder groups analysed separately (where the distinctions are significant). Who benefits most? Who loses most? Why and in what way?
- *Significance of impacts:* 1) *For any given change, how significant is it to livelihood sustainability?* i.e. how does it compare with what people have or need, or compared to alternative sources? 2) *For all the various impacts, how do people compare and rank them?* Which are the most important positive ones and most important negative ones? For whom?
- *Exhaustive analysis or optimal ignorance?* The *degree of change* needs to be identified. The key features (**strategies, criteria, priorities, and constraints**) need to be known, but the focus should be on the elements of *change* and the *direction* and *type* of change that can be identified.

APPENDIX B STUDY INFORMATION LETTER

Subject: Doctoral Research Project: Tourism as a Livelihood Strategy in Indigenous Communities: Cases from Taiwan

My name is Chang-Hung (Teresa) Tao. I am a third year doctoral student engaged in a research project titled, indigenous peoples and tourism in Taiwan, under the supervision of Professor Dr. Geoffrey Wall of the Department of Geography at the University of Waterloo, Canada. I would like to provide you with more information about this project and what your involvement would entail if you and the community decide to take part.

The Taiwanese government has encouraged tourism development in rural areas in response to many challenges Taiwanese aboriginal peoples have been facing. Can tourism really be a panacea, as the government and researchers advocate, bring indigenous people increased economic independence, which will be accompanied by a higher degree of self-determination and cultural pride as poverty is decreased? One way to explore the answer is to see whether tourism can be incorporated as one component of rural development particularly for indigenous peoples. I attempt to adopt your perspective to understand your views and responses concerning changes induced by tourism development, in particular, to explore a wide range of livelihood impacts – direct and indirect, positive and negative (based on your criteria) – that most likely reflect more complex reality of your concerns and aspiration. This is novel approach since the majority of the literature on indigenous people and tourism is undertaken from non-indigenous perspective (e.g., Han researchers, the government). Because your community has been experienced tourism phenomenon in the past six years, your opinions will be very important to this study. Thus, I would appreciate the opportunity to speak with you and community members.

I'd be grateful if you could find time to speak with me and introduce me to the community members. Perhaps we could agree to meet for an hour initially, and if further discussion seems useful we can arrange another meeting. I'd appreciate as well your introduction of other persons whom I might contact as possible resources for this study.

Participation in this study is voluntary and would involve a number of interviews in the community at a convenient location and time. With the participant's permission, the interview will be recorded. There are no known or anticipated risks to you and other participants in your community in this study. The questions are quite general (for example, what activities do you do to support yourself and your family and why, which are most important, which are most preferable? How were livelihood strategies different before the tourism enterprise began? How significant are the benefits/costs in relation to household needs and strength?). Any participant may decline answering any questions he/she feel he/she do not wish to answer. All information he/she provide will be considered confidential and grouped with responses from other participants. Further, he/she will not be identified by name in my dissertation or in any report or publication resulting from this study. The data collected through this study, such as audiotapes and notes, will be stored indefinitely in a secure location, accessed only by the researchers Dr. Geoffrey Wall and Chang-Hung Tao associated with this project.

If after receiving this letter, you have any questions about this study, or would like additional information to assist you in reaching a decision about your own participation, as well introduce other community member to involve, please feel free to contact me Chang-Hung Tao at (c) 0911028834.

I would like to assure you that this study has been reviewed and received ethics clearance through the Office of Research Ethics at the Univeristy of Waterloo, Canada. However, the final decision about participation is yours. In the event that you have any commentsor concerns resulting from your participation in my study, please contact the director of that office, Dr. Susan Sykes, at 1-519-888-4567 Ext. 6005, email: ssykes@admmail.uwaterloo.ca

Thank you for your assistance with this project.

Yours Sincerely,

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APPENDIX C CONTEXT OF COMMUNITY DEVELOPMENT ASSOCIATION

The village office is under the jurisdiction of the township administration, which is under the county government. In the past, all village affairs had to go through the layers of the government administration system (top-down) to obtain approval. This consumed a great amount of time and manpower. Besides, since the level of the village office is low, it is unable to seek assistance beyond the unit (the local government). The community development association is an NGO and not part of the government system, so it has great freedom to apply for subsidies and assistance from both central and local governments.

Community development is one of 14 aspects of social welfare, which the Taiwanese government has promoted in the past 30 years. The purpose is to satisfy people's needs to reduce the impact brought by social changes (Ministry of Interior, 2003).

In 1965, the Executive Yuan issued "the Current Policy of the Principle of People's Livelihood". The policies ensured that community development was one of the major seven items of the country's social welfare measures. According to the policies, "The balanced development of economy and society shall be achieved through community development and promotion of reconstruction of people's livelihood". To enhance the progress of the task, the Ministry of the Interior stipulated "Work Outline of Community Development" in 1968. The Work Outline was reported to the Executive Yuan for approval and amended to be "the Guidelines of Community Development" in 1983. After more than 30 years of efforts, a number of accomplishments have achieved. In May of 1991, in order to meet the demand brought by social changes, to provide a legal system for community development and to improve the quality of community organizations, the amended "Work Outline of Community Development" was announced for the goals of democracy, autonomy and self-help. The community committee, previously having the status of a social movement, was changed to be a community development association established under "the Law of Citizen's Organizations", having the status of a legal entity. For community development, the Ministry of the Interior coordinates with related ministries/departments for policy setting at the central government level. At the level of the local government, the offices of the Bureau of Social Affairs of municipalities, counties (cities) and Division of Civil Affairs (Social Affairs or Social Economy) of villages (towns, cities, districts) are responsible for the tasks. They coordinate with police departments and other related units of civil affairs, construction affairs, public housing, education, agriculture, sanitation and environmental protection for work delegation, cooperation, and mutual support. Thus, the matter of community development can be processed effectively and smoothly (Ministry of Interior, 2003).

Many scholars criticize that the government has promoted community development by using a top-down approach for more than 30 years. The assessment of demand, funds, land, facilities and professional personnel, nearly all come from the government and the people are often in a passive role. They advocate a bottom-up approach to promote community construction. The approach would have citizens leading public affairs and the government standing in an auxiliary position. Though the purpose is very good, many community workers are discouraged to implement the ideal because many communities are unable to support

themselves and act on their own due to the lack of funds and professional manpower, and the government instead bears less responsibilities if a bottom up approach is emphasized. Therefore, a more realistic measure is to abandon the myth from top to bottom or from bottom to top and adopt a cooperative strategy of “able up and able down” which suits local conditions (Tang, 2002)

APPENDIX D CONTEXT OF SHANMEI COMMUNITY SHARE COOPERATIVE

The Danayigu Ecological Park began to charge from 1995 but later stopped for one year because of there was no basis in regulations for charging a fee and prosecutors and investigation bureaus paid close attention. Later, under the assistance of Alishan Township Administration and government organizations concerned with community development, the difficulty was overcome by referring to the 2nd paragraph of article 17 of Outlines of Community Development: "a fund source of a community development association can include producing incomes in the community". Accordingly, the park was taken over and managed by Shanmei Community Development Association with legal basis (Department of Social Affairs, Ministry of Interior, 1993; 1995, cited in Liang and Chang, p.42, 2005). In 2003, the annual income of the park reached NT\$ 30 million (CAD\$ 1.2 million) and the association was asked to pay taxes by the National Tax Administration of Southern Taiwan Province and the Ministry of Finance, according to the tax law. The community was constantly resisting and with the assistance of the county government of Jiayi, prepared and organized Shanmei Community Share Cooperative, which was established in December 2004, to exempt them from taxation by referring to the article 8 of the Laws of Work Right Guarantee Protection for the Original Residents stipulated in 2001: "the operator abiding by laws of aboriginal's cooperation, the planted agent exempt from income tax and business tax in six years from the day of putting in force in this law. " The cooperative, however, has resulted in great disputes in the village because of possible unfair benefit sharing.

APPENDIX E CONTEXT OF DANAYIGU RIVER PROTECTION

In the village assembly held on October 23, 1989, in order to persuade all Shanmei villagers to support the plan for Danayigu, the previous village head SB001 read out the article which was written with much time and effort. Part of the content is as follows (Gau, 1997):

...In order to expand the school ground of Shanmei Public School, you (the elders) launched voluntary labour to flatten more than 2,000 sq.m., with over ten meter in height stones on a sloping hillside field. You at the time tied up more than 60 huge rocks with rattan, dragged them into a gully, and buried them in soil. Such a difficult task, you accomplished it by being united...

...Thank you for your devotion of everything to Shanmei construction, which has created a foundation for Shanmei development. But when you passed the stick to us, we young people have encountered a great difficulty. Our agriculture completely cannot compete in the big environment. So I propose to build the Danayigu Ecological Park, a new undertaking with tourism and ecological conservation coexisting, and let Shanmei set out again from Danayigu...

SB001 used local cultural identity accumulated through history to persuade elders to release river rights (Liang & Chang, 2005) and emphasized the *esprit de corps* of the Cou as well as the significance of the inheritance of such spirit (M.-H. Wang, 2001).

APPENDIX F LIST OF INTERVIEWEES AND RELATED INFORMATION

Interviewee No. (Shanmei)	Position	Sex	No. of interviews	Interview location	Date
SA001	Member of the board of directors of Shanmei Community Development Association (SCDA)	M	1	His Car	Sept. 2004
SA002	Director of Danayigu River Ecological Park (the park)	M	1,2	The park	Sept. 2004 Nov. 2005
SA003	Chair of the board of directors of SCDA	M	1,2	SCDA office	Sept. 2004 Dec. 2005
SA004	President of the Long-Life Club of SCDA	M	1,2	SCDA office	Sept. 2004 Oct. 2004
SA005	General executive & analytic accounting of SCDA	M	1,2	SCDA office	Oct. 2004 Dec. 2005
SA006	President of the Youth Association of SCDA, accountant of SCDA	F	1,2	SCDA office	Oct. 2004 Nov. 2005
SA007	Ex-board chairman of SCDA, owner of Shan-jy-mei restaurant & villa	M	1	Shan-jy-mei restaurant	Oct. 2004
SA008	Ex-member of the board of director of SCDA, current general executive of SCDA	M	1,2	The park	Oct. 2004 Nov. 2005
SA009	Member of the board of directors of SCDA, ex-general executive of SCDA	F	1,2	Yubas Café SCDA office	Oct. 2004 Nov. 2005
SA010	Accountant of SCDA	F	1	SCDA office	Oct. 2004
SA011	Secretary and office clerk of SCDA	F	1,2,3,4	SCDA office	Oct. 2004 Dec. 2004 Nov. 2005
SA012	Shaman, member of the board of supervisor of SCDA, director of dancing league of Danayigu River Ecological Park, singer of the Tamayae band	M	1	His home	Oct. 2004
SA013	Member of the board of directors of SCDA, proprietor of the restaurant in the park and homestay	M	1,2	Restaurant	Oct. 2004 Nov. 2004
SA014	Member of the board of director of SCDA	M	1	SCDA office, The park	Oct. 2004 Nov. 2005
SA015	Member of the board of supervisors & directors of SCDA, dancer	F	1,2,3,4, 5,6,7,8	Pavilion, The park	Oct. 2004 Dec. 2005
SA016	Ex-chairman of the board of directors of SCDA	M	1,2	His home	Oct. 2004 Dec. 2005
SA017	Cashier of SCDA, handicraft teacher	F	1,2,3	SCDA office, her home	Nov. 2004 Dec. 2005
SA018	Member of the board of supervisors of SCDA, head of Neighbourhood unit 6	F	1,2	Handicraft studio, her home	Nov. 2004 Dec. 2005
SA019	Member of the board of directors of SCDA, head of hunters	M	1,2	His home	Dec. 2004 Dec. 2005

(Table continues)

(Continued)

Interviewee No. (Shanmei)	Position	Sex	No. of interviews	Interview location	Date
SA020	Member of the board of directors of SCDA, proprietor of a restaurant and booths in the park	M	1	The park	Nov. 2005
SA021	Secretary of SCDA	F	1	SCDA office	Nov. 2005
SA022	Chair of the board of supervisors of SCDA	F	1,2	Her farm field	Nov. 2005 Dec. 2005
SB001	Missionary of Xinmei Presbyterian Church, ex-head of Shanmei village, and ex-member of the board director of SCDA	M	1,2,3	His home	Sept. 2004 Nov. 2004 Nov. 2005
SB002	Head of Shanmei village	M	1,2,3,4,5	Village office, grocery store	Oct. 2004 Nov. 2004 Dec. 2005
SB003	Ex-village affairs officer	M	1	Village office	Nov. 2004
SB004	Village affairs officer	F	1	Village office	Nov. 2005
SC001	Shanmei police, the president of Shanmei Elementary Parents Association	M	1,2,3,4	Shanmei police station	Oct. 2004 Dec. 2004 Nov. 2005
SC002	People's representative of Alishan Township	M	1,2,3,4,5	His home	Oct. 2004 Nov. 2005
SC003	Ex-director of Academic Affairs of Shanmei elementary school, owner of Yiguyajwu lodge	F	1,2	Yiguyajwu lodge	Oct. 2004 Nov. 2005
SC004	Nurse of Shanmei Clinic	F	1,2,3,4	Her home, clinic, her car	Oct. 2004 Nov. 2004 Nov. 2005
SC005	Teacher of Shanmei nursery	F	1	Nursery	Dec. 2005
Key informants	31		72		
SC006	Head of Neighbourhood unit 1	M	1	SCDA office	Nov. 2005
SC007	Head of Neighbourhood unit 5	M	1	His home	Dec. 2005
SD001 (Han)	Vendor in the park	F	1	The park	Oct. 2004
SD002	Vendor in the park	F	1,2	The park	Oct. 2004 Nov. 2005
SD003	Patrol (guard) of the park	M	1	The park	Oct. 2004
SD004	Interpreter, owner of Binbin campground	M	1,2	The park	Oct. 2004 Nov. 2005
SD005	Patrol (guard) of the park, the only woman hunter	F	1,2	The park	Oct. 2004
SD006	Interpreter, plant tender of the park	F	1,2	The park	Oct. 2004 Nov. 2005
SD007	Patrol (guard) of the park, hunter	M	1	The park	Dec. 2004
SD008	Vendor in the park	F	1	The park	Nov. 2005
SD009	Homestay proprietor, casual labourer, staff of a restaurant in the park	F	1,2,3	The park	Nov. 2005
SD010	Dance coach	F	1,2	The park	Nov. 2005 Dec. 2005

(Table continues)

(Continued)

Interviewee No. (Shanmei)	Position	Sex	No. of interviews	Interview location	Date
SD011	Proprietor of a restaurant in the park	F	1	The park	Nov. 2005
SD012	Staff of Shan-jy-mei restaurant and villa	F	1	Shan-jy-mei restaurant	Nov. 2005
SD013	Staff of a handicraft store in the park	F	1	Handicraft store	Nov. 2005
SD014	Owner of a handicraft store in the park	F	1	Handicraft store	Nov. 2005
SD015	Proprietor of the restaurant in the park	F	1,2	The restaurant	Nov. 2005
SD016	Farmer, casual worker, staff of a restaurant in the park	M	1	Grocery store	Nov. 2005
SD017	Proprietor of Yubas Café	F	1	Café	Dec. 2005
SD018	Teacher, proprietor of Yubas Café	M	1	Café	Dec. 2005
SD019	Dancer, host of the dancing league	F	1	Her home	Dec. 2005
SD020	Dancer	F	1	The park	Dec. 2005
SD021	Ticket seller	F	1	The park	Dec. 2005
SD022	Vendor in the park	M	1	The park	Dec. 2005
SD023	Interpreter, casual labourer	M	1	The park	Dec. 2005
SD024	Owner of Shan-jy-mei restaurant outside Shanmei	M	1	Restaurant	Dec. 2005
SD025	Patrol (guard) of the park	M	1	The park	Dec. 2005
SE001	Member of the Long-Life Club of SCDA	M	1	SCDA office	Oct. 2004
SE002	Farmer, casual labourer	F	1	Grocery store	Oct. 2004
SE003	Resident	F	1	Her home	Oct. 2004
SE004	Farmer, owner of a grocery store	F	1	Grocery store	Oct. 2004
SE005	Owner of a grocery store	M	1	Grocery store	Oct. 2004
SE006	Staff of a eatery	F	1	Eatery	Nov. 2005
SE007	Housewife, proprietor of a breakfast booth	F	1	Booth	Dec. 2005
SE008	Shanmei nursery teacher & casual labourer of Yubas café	F	1	Café	Dec. 2005
SE009	Beverage vendor outside the park	F	1	Beverage stand	Dec. 2005
SE010	Student, casual labourer of Tso Tso Tsu eatery	F	1	Eatery	Dec. 2005
General villagers	37		45		
Total	68		117		

Note. Unmarked ethnical identity is Cou

Interviewee No. (Chashan)	Position	Sex	No. of interviews	Location	Date
CA001 (Bunun)	Ex-head of village, ex-general executive of Chashan Community Development Association (CCDA). elder of Presbyterian Church, Homestay proprietor	F	1,2,3,4,5,6,7	Her home	Nov. 2004 Dec. 2004 Nov. 2005
CA002 (Han)	Chairman of Chashan Leisure Agricultural Area, member of the board of directors of CCDA, guesthouse proprietor	M	1,2,3,4,5,6,7	His home	Nov. 2004 Dec. 2004 Nov. 2005
CA003	Member of the board of directors of CCDA, owner of Chiayama Villa and restaurant and a general store	M	1,2,3,4	His home	Nov. 2004 Nov. 2005
CA004 (Bunun)	Member of the board of directors of CCDA, performer of Ceayama Band, hunter, homestay proprietor	M	1,2,3	His home	Nov. 2004 Nov. 2005
CA005	Chairman of the board of directors of CCDA, guesthouse appropriator, firearms dealer (confidential)	M	1	His home	Nov. 2004
CA006	Chairman of the board of supervisors of CCDA, ex-head of Neighbourhood 1	M	1	His home	Dec. 2004
CA007	Member of the board of directors of CCDA, guesthouse proprietor	M	1	His home	Dec. 2004
CA008	General affair of CCDA, head of Neighbourhood unit 1	M	1	His home	Dec. 2004
CA009	Ex-general executive of CCDA, executive director of Cou Culture and Arts Foundation, singer	M	1,2	His home	Dec. 2004
CA010	Secretary of CCDA & Cou Culture and Arts Foundation	F	1,2,3	Her home	Dec. 2004 Nov. 2005
CA011	Member of the board of supervisor of CCDA, hunter, farmer, homestay proprietor	M	1,2	His home	Dec. 2004 Nov. 2005
CA012	Member of the board of directors, nurse, homestay proprietor	F	1,2,3	Clinic	Nov. 2005
CA013	Secretary of CCDA	F	1	Her home	Nov. 2005
CB001 (Bunun)	Village affairs officer, guesthouse proprietor	M	1	His home	Nov. 2004
CB002 (Han)	Head of Neighbourhood 2, farmer	M	1,2	His home	Dec. 2004 Nov. 2005
CB003	Ex-head of Neighbourhood 2	M	1	His home	Dec. 2004
CB004	Head of village, homestay proprietor	M	1,2	His home	Dec. 2004 Nov. 2005
CB005 (Han)	Ex-head of Neighbourhood 4, guesthouse proprietor	M	1,2,3	His home	Dec. 2004 Nov. 2005
CB006 (Han)	Ex-head of Neighbourhood 5, farmer, tea producer.	F	1,2	Her home	Dec. 2004
CC001	Minister of Chashan Presbyterian Church	M	1,2	Church	Oct. 2004 Nov. 2004

(Table continues)

(Continued)

Interviewee No. (Chashan)	Position	Sex	No. of interviews	Location	Date
CC002 (Han)	Layperson of Presbyterian Church	F	1,2	Her home	Oct. 2004
CC003	Minster of Shanmei Presbyterian Church	M	1,2	His home	Nov. 2004 Nov. 2005
CC004	People's representative of Alishan Township, homestay proprietor	F	1	Her home	Dec. 2004
CC005 (Paiwan)	Wife of Minister of Chashan Presbyterian Church	F	1	Church	Nov. 2005
Key informant	24		55		
CD001	Proprietor of Mother Tian, performer of Ceayama Band	F	1	Tour Bus, Mother Tian eatery	Nov. 2004
CD002 (Bunun)	Homestay Proprietor, farmer	F	1	Her home	Nov. 2004
CD003	Performer of Ceayama Band	F	1	Mother Tian eatery	Nov. 2004
CD004	Homestay proprietor, performer of Ceayama Band,	M	1,2	His home	Nov. 2004
CD005 (Han)	Homestay proprietor, art teacher	F	1,2,3,4	Her home	Nov. 2004 Nov. 2005
CD006 (Han)	Homestay proprietor, tea producer	M	1,2	His home	Nov. 2004
CD007 (Han)	Homestay proprietor	F	1,2	Her home	Nov. 2004
CD008	Interpreter	M	1	CA009's home	Dec. 2004
CD009	Farmer, homestay proprietor	F	1,2	Her home	Dec. 2004 Nov. 2005
CD010	Eatery owner	F	1,2,3	Eatery	Dec. 2004 Nov. 2005
CD011	Farmer, performer of Ceayama Band	F	1	Beside the road	Nov. 2005
CD012 (Han)	Owner of Ceayama Villa and restaurant and a general store	F	1	Her home	Nov. 2005
CD013	Guesthouse proprietor, general store owner	F	1	Her home	Nov. 2005
CD014	Ceayama Band performer, casual labourer of Ceayama Villa	F	1	Her home	Nov. 2005
CD015	Farmer, guesthouse proprietor	F	1	Her home	Nov. 2005
CE001	Casual labourer, owner of a grocery store	M	1,2	His car, his home	Oct. 2004
CE002	Artist, hunter	M	1,2,3,4,5,6,7	Car, his home	Nov. 2004 Jan. 2005 Nov. 2005
CE003	Farmer	M	1	Farm field	Nov. 2004
CE004	Housewife	F	1,2,3	Her home, eatery	Dec. 2004 Nov. 2005
CE005 (Han)	Tea and cane sugar producer	F	1	Her home	Dec. 2004
CE006	Casual labourer	F	1,2	Her home, church	Dec. 2004 Nov. 2005

(Table continues)

(Continued)

Interviewee No. (Chashan)	Position	Sex	No. of interviews	Location	Date
CE007 (Han)	Farmer	M	1	Field	Dec. 2004
CE008 (Han)	Farmer	M	1	CC004's home	Dec. 2004
CE009	Proprietor of breakfast stand	F	1,2	Stand	Dec. 2004 Nov. 2005
CE010	Housewife, performer of Ceayama Band, tutor of Chashan elementary school	F	1,2	Eatery, car	Nov. 2005
CE011	Housewife	F	1	Eatery	Nov. 2005
CE012 (Han)	Casual labourer, eatery proprietor	M	1	Eatery	Nov. 2005
CE013 (Han)	Tea producer	M	1	His home	Nov. 2005
CE014	Factory worker	F	1	Eatery	Nov. 2005
CE015 (Han)	Proprietor of a general store	F	1	General store	Nov. 2005
CE016	Resident	M	1	General store	Nov. 2005
CE017 (Han)	Casual labourer	M	1	His home	Nov. 2005
CE018 (Han)	Casual labourer	F	1	Her home	Nov. 2005
CE019	Farmer	F	1	Her home	Nov. 2005
CE020 (Han)	Farmer, tea producer	M	1	Food stand	Nov. 2005
CE021	Casual labourer	M	1	Food stand	Nov. 2005
CE022	President of Youth Association of CCDA, farmer	M	1	Beside the road	Nov. 2005
General villagers	36		57		
Total	60		112		

Note. Unmarked ethnical identity is Cou

List of Government Representatives, Academics, NGO Staff outside the Villages

Interviewee No.	Position	Sex	No. of interviews	Location	Date
G1 (Han)	The Deputy Director of Alishan National Scenic Area Administration, Tourism Bureau, Taiwan	M	1	His office	Dec. 2004
G2 (Han)	The Chief of Marketing & Services Section of Alishan National Scenic Area Administration	F	1	Her office	Dec. 2004
G3 (Han)	The Specialist of the Planning Section of Alishan National Scenic Area Administration	F	1	Her office	Dec. 2004
G4 (Cou)	The vice chairman of the Council of Indigenous Peoples, Executive Yuan, Taiwan, professor of Taipei Municipal Teachers College, the author of Fire of Kuba-Research of the myth of Cou (in Chinese)	M	1	His office	Jan. 2005
G5 (Tayal)	The specialist of Dept. of Economics and Public Construction, Council of Indigenous Peoples, Executive Yuan	M	1	His office	Jan. 2005
A1 (Han)	Lecturer of a few community universities. He carried out his master's research in Shanmei and currently a Shanmei resident	M	1	Yubas Café	Dec. 2004
A2 (Han)	Professor in the Dept. of Horticultural Science and the Centre of Educational and Industrial Development of Aboriginal People at the National Jiayi University	M	1	Yiguyajwu lodge	Dec. 2004
A3 (Han)	Associate professor in the Graduate Institute of Leisure, Recreation and Tourism Management at the National Jiayi University	F	1	Her office in National Jiayi Univ.	Jan. 2005
A4 (Cou)	Chairman of Cou Culture and Arts Foundation, Associate professor in the Dept. of Geography at National Taiwan Normal University	M	1		Jan. 2005
A5 (Han)	A master's student in the Dept. of Ecology at the Providence University. Her fieldwork in indigenous communities lasted for 5 years	F	1	Office in Providence University	Jan. 2005
A6 (Cou)	Principal of Dabang and Lijia Elementary Schools, doctoral student in the Dept. of Agricultural Extension-Rural Sociology at National Taiwan University	M	1	His home	Jan. 2005
A7 (Han)	The Director of Social Affair Bureau, Jiayi County Government, Taiwan, the ex-acting mayor of Alishan Township	M	1	His office	Jan. 2005

(Table continues)

(Continued)

Interviewee No.	Position	Sex	No. of interviews	Location	Date
A8 (Han)	Researcher of the Dept. of anthropology of National Museum of Natural Science	M	1	Telephone interview	Jan. 2005
N1 (Han)	Worker of World Vison	F	1	Homestay	Nov. 2005
Total	14		14		