A Case Study of the

MULTI-ACTOR INITIATIVE FOR THE AUTONOMOUS AND SUSTAINABLE GOVERNANCE OF THE INDIGENOUS TERRITORY OF MONTE VERDE

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LEARNING FROM PRACTICE:
MULTI-ACTOR INITIATIVES

In July 2012, Hivos decided to reflect on its experience in engaging with multi-actor initiatives, which are collaborative approaches to addressing complex problems. Hivos wished to learn from practice, and to draw out the implications of these lessons for its future course. At the core of this exercise has been the preparation of case studies of four multi-actor initiatives. The case studies have consciously been chosen to cover the range in terms of geography, thematic focus and role(s) of Hivos. The three other case studies are: Rural Value Chain Programme (Western Highlands of Guatemala), Stop Child Labour Campaign (multi-country), and Sumba Iconic Island. The purpose of the case studies is to illuminate and examine Hivos' engagement with multi-actor initiatives by capturing and analyzing the unfolding process, and drawing out the lessons learnt. In doing so, specific attention has been paid to the roles played by Hivos and other actors over time, the challenges and dilemmas encountered, and the creative solutions and innovations generated.

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ACRONYMS

ABT   Autoridad para la Fiscalización y Control de Bosques y Tierras or Forest and Land Supervision and Control Authority

APCOB   Apoyo para el Campesino Indígena del Oriente Boliviano or Support to the Indigenous Peasant of Eastern Bolivia

CEJIS   Centro de Estudios Jurídicos e Investigación Social or Legal Studies and Social Research Center

CCIC   Central Indígena de Comunidades de Concepción or Indigenous Organization of the Communities of Concepcion

CICOL   Central Indígena de Comunidades Originarias de Lomerío or Indigenous Organization of the Communities of Lomerio

CIDOB   Confederación de Pueblos Indígenas de Bolivia or Confederation of Indigenous Peoples of Bolivia

CIP-SJ   Central Indígena Paiconeka de San Javier or Paiconeka Indigenous Organization of San Javier

CPE   Constitución Política del Estado or Political Constitution of the State

FAN   Fundación Amigos de la Naturaleza

FCBC   Fundación para la Conservación del Bosque Chiquitano

HIVOS   Humanist Institute for Development Co-operation

IBIS   Danish Development Organization

LMAD   Ley Marco de Autonomías y Descentralización or Framework Law of Autonomies and Decentralization

MAI   Multi-Actor Initiatives

MTC   Mesa Técnica de Coordinación Interinstitucional or Inter-institutional Technical Coordination Group

OICH   Organización de Indígenas Chiquitanos or Organization of Chiquitania Indigenous People

RO-SAM   Regional Office for South America, Hivos

SICIREC   Sistemas de Circulación Ecológica –organización y empresa internacional or Ecological Circulation System – organization and international business

SNV   Dutch Service for Development Cooperation

TCO   Territorio Campesino Originario or Indigenous Peasant Territory

TI-MV   Territorio Indígena de Monte Verde or Indigenous Territory of Monte Verde

TIOC-MV   Territorio Indígena Originario Campesino de Monte Verde or Peasant, Indigenous and Indigenous Territory of Monte Verde

INRA   Instituto Nacional de Reforma Agraria or National Institute of Agrarian Reform

SIG   Sistema de Información Geográfica or Geographical Information System

SBDA   Sociedad Boliviana para el Desarrollo Ambiental or Bolivian Association for Environmental Development

UFM   Unidades Forestales Municipales or Municipal Forestry Units

EXECUTIVE SUMMARY

In order to learn from previous experiences, Hivos is examining its role(s) and performance in various multi-actor initiatives. This case study recounts the experiences of the multi-actor initiative for the autonomous and sustainable governance of the indigenous territory of Monte Verde in Bolivia.

Bolivia is one of a few Latin-American countries with a majority indigenous population. According to the 2001 census, 62% of the 8.3 million people identify themselves as belonging to one of the country's 36 indigenous peoples. In the last 20 years, there has been an upsurge of struggles and claims by indigenous peoples demanding their rights, autonomy and self-determination. When Evo Morales, a labour leader and cocoa grower of the indigenous Aymara community, became Bolivia's first president from an indigenous community in 2006, profound changes were made to the economic and political structure of the State. These changes caused deep tensions and conflicts arose, largely as a result of the loss of privileges and political power by traditional elites. Nevertheless, political stability has been achieved and progress made in economic, political and social issues, especially with regard to recognition of the rights of the indigenous peoples, territorial autonomies and socio-cultural diversity.

A new constitution, which was adopted in 2009, established Bolivia as a plurinational state. The current government's National Development Plan prioritizes the access of indigenous peoples and peasant communities to land, and the generation of the appropriate conditions for their comprehensive development and full enforcement of their territorial rights, with emphasis on vulnerable and voluntarily isolated peoples. This created a favourable scenario for designing a multi-actor initiative in the Indigenous Peasant Territory of Monte Verde.

This multi-actor initiative involves a set of organizations working on different themes at different levels, which have constructed a common vision and plan, generating high participation and potential impact centred on common goals. This vision is for the Indigenous Territory of Monte Verde to be governed autonomously by the Chiquitania People, the largest group in the territory, taking into consideration their practices, habits and culture, allowing for the comprehensive sustainable development of the men and women owners of the territory.

While the Monte Verde multi-actor initiative is still largely at the stage of coordinating to avoid the duplication of activities, there has been progress, including the establishment of an Inter-Institutional Technical Coordination Committee (Technical Group henceforth) that is contributing to the empowerment of local actors. The initial years of this multi-actor initiative have served to build trust among actors and to formulate a Comprehensive Development Plan through a participatory process. Further, the provisional government and indigenous organizations have begun to take ownership of a political advocacy agenda based on the Comprehensive Development Plan, and they recognize the Technical Group as a space for coordination and planning with external institutions and actors. Another significant achievement is the creation of opportunities for women and young people to make their voices heard.

This case study examines the design and implementation phases of the multi-actor initiative and details recommendations and lessons learned.

Among the key lessons learnt from this multi actor initiative are:

- There is a need for clarity and communication regarding actors' roles. Hivos often has a diffuse role in multi-actor initiatives. Each role should be assumed in a consistent fashion and attendant responsibilities must be clearly communicated to other actors.
- Ownership by local communities and organizations is critical to the success of the initiative. In this instance, fostering ownership was a challenge given existing strengths and weaknesses and also the history of internal disputes and the dynamics of indigenous organizations.
- Collaboration may take time to mature. In Monte Verde, the exercise of autonomy requires leadership with specific capacities. Hence, the training of young people in political leadership processes is a crucial strategic long-term requirement.

- The existence of trust between the main actors is key in a multi-actor initiative. It allows them to transcend their differences and share a common political commitment to support the rights of indigenous peoples.
- There is a need to include "unheard voices," women and young people in this case, in the consultation, design and implementation processes.
- It can be prudent to identify a facilitating institution, without institutionalizing or overburdening its operation with red tape. More structured facilitation will bring more common-interest actions under the umbrella of the multi-actor initiative's strategic aims. In addition, focused facilitation can help address key issues and bottlenecks.
- All multi-actor initiatives should consider consensus building to be a permanent ongoing task, independent of the approval of a strategic plan.

INTRODUCTION

This case study is part of a broader systematization of lessons learnt in the course of promoting and participating in a variety of multi-actor initiatives. A multi-actor initiative[1] is undertaken by several actors with complementary strengths, with the aim of creating joint impact to address complex problems. A successful multi-actor initiative is one where the joint impact is greater than the impact culminating from individual efforts, and contributes to systemic change.

To identify lessons learnt from its role(s) in various multi-actor initiatives and to formulate implications for its future direction and strategy, Hivos has prepared case studies of five multi-actor initiatives in which it was involved.

These case studies assess:

• what the value of each of the assumed roles was;
• what Hivos has contributed in different roles;
• what these multi-actor initiatives have brought to Hivos over time.

This case study recounts the experiences of a multi-actor initiative for the autonomous and sustainable governance of the Indigenous and Peasant Territory of Monte Verde (TIOC-MV), Santa Cruz, Bolivia, promoted by Hivos' South-American Regional Office (RO-SAM).

This case study is based on support and background documents, field visits, discussions with actors[2] involved in the multi-actor initiative, including Hivos, and interactions with other interested groups. Preliminary results were shared with key actors during a meeting in Santa Cruz, Bolivia, and their contributions and feedback are included. Furthermore, RO-SAM's Green Entrepreneurship Team, as well as Jamuna Ramakrishna, Hivos' Senior Advisor, Learning, commented on an earlier draft and contributed to the final report.

Between 2010 and 2011 RO-SAM, together with local organizations, undertook a series of consultations and surveys to formulate a multi-actor initiative. The experiences of Hivos' counterparts in South America were analyzed and it was decided that the Indigenous and Peasant Territory of Monte Verde in Bolivia offered the best opportunities for a programmatic approach, based on which a set of organizations, working on different themes and at different levels, could construct a common vision and plan, generating high participation and potential impact centered on common goals. Hivos' presence and support to indigenous organizations and NGOs in the region for more than twenty years, made possible an open dialogue with actors with ample experience and a track record in the region.

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1 "A Multi Actor Initiative (MAI) is a large scale program in which actors from different spheres (i.e. civil society, private sector, government) come together to address a common problem. The initiators of the MAI have agreed on a common goal, results and strategy to reach these, based on a careful analysis of the problem to be addressed. Other actors involved do not necessarily (explicitly) subscribe fully to the analysis and strategy, but they have expressed an interest to contribute to certain aspects of the Initiative. To reach the goal, the actors depend on each other's activities and results and therefore a coordination structure has to be in place. Initiators and other actors can be (existing or new) CSO partners, but also commercial parties, governmental bodies or others (e.g. media)." Hivos/TEC Memo 11.15 dated 28 April 2011, entitled 'Format Concept Note Proposal MAI'.
2 See Annex 1 for a list of interviewees and community visits.

CONTEXT

Bolivia is one of a few Latin-American countries with a majority indigenous population. According to the 2001 census, 62% of the 8.3 million people identify themselves as belonging to one of the country's 36 indigenous peoples. The Quechua are the largest community (31% of Bolivia's population) followed by the Aymara (25%), both of whom inhabit the western highlands. The remaining indigenous people identify themselves as belonging to one of 34 small communities of the Amazon and Chaco regions located in the western lowlands (Van de Sandt & Zolezzi, 2010:19).

In the last twenty years there was an upsurge of struggles and claims by indigenous peoples demanding their rights, autonomy and self-determination. When Evo Morales, a labour leader and cocoa grower of the indigenous Aymara community, became Bolivia's first president from an indigenous community in 2006, profound changes were made to the economic and political structure of the State. These changes caused deep tensions and conflicts arose, largely due to the loss of privileges and political power by traditional elites. Nevertheless, political stability has been achieved and progress has been made in economic, political and social issues, especially with regard to recognition of the rights of the indigenous peoples, territorial autonomies and socio-cultural diversity.

A new constitution, which was adopted in 2009, established Bolivia as a plurinational state. The current government's National Development Plan prioritizes the access of indigenous peoples and peasant communities to land, and the generation of the appropriate conditions for their comprehensive development and full enforcement of their territorial rights, with emphasis placed on vulnerable and voluntarily isolated peoples. More than 20 million hectares of land have been designated as Indigenous Peasant Territories. These areas are extremely rich in biodiversity and natural resources. Territories are required to follow a set procedure to secure their right to govern themselves autonomously. This includes applying to the national government, establishing a provisional government, preparing a constitution, developing a strategic plan, and establishing a track record in self-government.

The context described constituted a favourable scenario for designing a multi-actor initiative in the Indigenous Peasant Territory of Monte Verde, which could have enormous potential to contribute to systemic change, as part of the wave of structural changes occurring in the country.

A. The Indigenous Peoples of Bolivia's Chiquitania

The Chiquitania People[3] is the largest group in the Indigenous Territory of Monte Verde. Their decades-long fight to achieve ownership of their land became a reality through Ministry Allocation Resolution on 3 June

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[3] In the lowlands, the main focus of Hivos work with Indigenous Peoples (…) there are 31 peoples constituting only 6% of the total indigenous population. Nevertheless, these numerically reduced groups have had important influence in the recent history of the Bolivian indigenous movement". Van de Sandt, Joris and Graciela Zolezzi. Case study concerning the development of Bolivia's indigenous peoples and Hivos' contribution. ETC EcoCulture / ETC Foundation. Bolivia, June 2010

2006 and through Titulo Ejecutorial or Executing Title. Subsequently, the Chiquitania People and their representative organizations initiated claims for the establishment and long-term management of their autonomy and an autonomous government for their territory. Ownership of the Indigenous and Peasant Territory of Monte Verde is exercised by the board of directors of three indigenous organizations representing 128 communities. These organizations are Central Indígena de Comunidades de Concepción (Indigenous Organization of the Communities of Concepcion, CCIC), Central Indígena de Comunidades Originiarias de Lomerío (Indigenous Organization of the Communities of Lomerio, CICOL) and Central Indígena Paiconeka de San Javier (Paiconeka Indigenous Organization of San Javier, CIP-SJ).

In 2010, after approximately three years of reflection, dialogue and consensus-building with a number of institutions, Centro de Estudios Jurídicos e Investigación Social (Legal Studies and Social Research Center, CEJIS) facilitated the development of the "Regulation for the protection, access, use, management and exploitation of the natural resources of the Indigenous Peasant Territory of Monte Verde." CEJIS did this together with CCIC, CICOL and CIP-SJ and the Indigenous Territorial Management Committee.

The main purpose of the Monte Verde multi-actor initiative is to empower the communities and organizations of the Chiquitania People to manage their territory autonomously and sustainably.

B. Main Actors in the Monte Verde Multi-Actor Initiative

The three indigenous organizations representing the Chiquitania People in the territory, CCIC, CIPJ and CICOL, have been involved in the multi-actor initiative since the first consultations and dialogue took place between 2010 and 2011. This engagement will be important for the long-term sustainability and impact of the multi-actor initiative. Ownership by indigenous communities and organizations is a critical challenge, given existing strengths and weaknesses and also the history of internal disputes and dynamics of indigenous organizations. The effort to integrate the participation of the main beneficiaries, to address their needs and the problems affecting their territory and their relationships with others has been one of the highlights of the multi-actor initiative.

The three indigenous federations are supported by the actors described below, each of whom participates in the initiative in different ways and at different levels. Other actors joined during the design and implementation process and will be introduced later.

Apoyo Para el Campesino Indígena del Oriente Boliviano (APCOB)[4] is a local NGO that initiated a series of dialogues among indigenous communities that lead to the creation of the Confederation of the Indigenous Peoples of Bolivia (CIDOB). Its mission is to support the indigenous people of eastern Bolivia to participate in society, to exercise their rights and to articulate development proposals that are congruent with their culture. Together with indigenous communities; it currently co-implements projects for sustainable management of natural resources; it also runs communication and intercultural education projects.

CEJIS defends the collective rights of indigenous people, autonomy and self-determination and provides legal support to the main indigenous and peasant entities and organizations of Bolivia's Amazonia, Chiquitanía, Chaco and Highlands.

Asociación Forestal Indígena (AFIN) or National Indigenous Forestry Association represents Community Forestry Organizations and Regional Forestry Associations at the national level. It aims to improve the sustainable use of natural resources in forest areas while strengthening and developing the technical, political and socio-economic sus-

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4 According to figures from Hivos and MVF, these amount to more than 1 million children in the last two decades.

tainability of its membership. Between them, the Community Forestry Organizations manage more than one million hectares of forests. AFIN is a community-based network that is run by indigenous people.

The Netherlands Development Organization (SNV), another key actor in the development of the Monte Verde multi-actor initiative, has ample experience in Bolivia, dealing with innovative issues such as inclusive businesses and the promotion of partnerships between the private sector and communities for sustainable business relations. In 2010, Hivos and SNV explored joint cooperation in Bolivia and Peru. SNV's experience in Bolivia's lowlands, its collaboration with Hivos in the departments of Beni and Tarija, and its past work in the Chiquitania, formed a good basis for the cooperation. While SNV has considerable experience with multi-stakeholder processes, albeit more aimed at the articulation or coordination of actors for public policy advocacy, the Monte Verde multi-actor initiative aims to construct a common vision and to coordinate technical and strategic actions in one specific territory. This goal was also a challenge for SNV and called for a new, adjusted methodology.

Hivos' work in Bolivia's lowlands began in the 1990s, supporting the main indigenous confederations. The efforts of these confederations contributed to the achievements of Bolivian democracy today and the advances made on issues concerning the rights of indigenous peoples. For many years, Hivos has supported APCOB, CEJIS and AFIN.

C. Roles of Main Actors

Although a strategic plan for Monte Verde was formulated through a wide consultative process with CCIC, CIPJ, CICOL and the Provisional Indigenous Government, four organizations working as a consortium – SNV, APCOB, AFIN and Hivos – are responsible for its implementation. Hivos is funder and facilitator. SNV coordinates implementation. APCOB and AFIN have responsibility for specific aspects of the strategic plan (see table on pages 12-14).

Hivos played a key role at the beginning and during the preparation of the strategic plan. A number of actors were attracted to the coordination group because of their links with Hivos. This was the case of International Union for Conservation of Nature (IUCN) and its counterparts Sociedad Boliviana de Derecho Ambiental (SBDA) and Sistemas de Circulación Ecológica – organización y empresa internacional (SICIREC). With financial support from Hivos, SICIREC has been asked by the consortium to contribute to a more business oriented vision to natural resources management in the Indigenous and Peasant Territory of Monte Verde. Also with Hivos' financial support, SBDA is contributing its legal and environmental approach to natural resources management, complementing specializations already existing in the consortium. Furthermore, Hivos was greatly interested in the added value of sustainable forestry production, going beyond management plans and some commercialization experiences gained during the past decade. These initial objectives will be worked out in depth as the design is fine-tuned and implementation starts.

D. Factors Facilitating the Multi-Actor Initiative

A key factor in the establishment of a multi-actor initiative is the existence of trust between the main actors, which allows them to transcend their differences and share a common political commitment to support the rights of indigenous peoples. APCOB, SNV and AFIN had collaborated earlier. Hivos, APCOB, CEJIS and a number of indigenous organizations had also cooperated thanks to Hivos' support in the territory over twenty years. SICIREC and SBDA, the new actors in the Technical Group, have well-recognized track records at national and regional levels. Furthermore, indigenous organizations were faced with the challenge of constructing autonomous territorial governance. This required development of relations with the public administration and the development of an approach that recognized local dynamics and ancestral cultures. These requirements helped to shape and give coherence to the multi-actor initiative.

For Hivos, it has been challenging to combine human rights and economic rights in one initiative given minimal links between Hivos' sectoral policies covering these areas. Indigenous organizations are worried not just about the sustainable management of forestry and natural resources but also about the need to increase capacities and negotiation skills, and to develop capacities to construct and maintain sustainable relationships with fair markets and companies looking to establish relations in the territory.

SNV, and later on SICIREC, were identified to develop inclusive businesses and develop social business practices and experiences, looking for equilibrium between environmental sustainability and profitability. This became one of the joint program's innovative action lines, broadly congruent with the demands of indigenous organizations and communities, although not lacking differences and challenges.

Differences among the actors may be related to the approach, to the lack of a business plan for the forestry chain that takes into account the particularities of the territory, and to inadequate attention paid to this issue by the Technical Group. Some additional differences are related to the particular interest of some communities in small-scale mining. All multi-actor initiatives should consider consensus building to be a permanent ongoing task, independent of the approval of a strategic plan. Dialogue and negotiation, integral to the multi-actor initiative process, imply continuing reflection and dialogue. This process involves all actors, including communities and their organizations and producers' associations.

The actors in the Monte Verde multi-actor initiative are motivated to cooperate and coordinate their actions in order to achieve more coherence, focus and impact. Local indigenous organizations are working together with NGOs to meet the challenges of establishing autonomous indigenous territorial governance and sustainable management of natural resources. Efforts are being made to prevent duplication of efforts and investment.

THE DESIGN PHASE

Two concrete processes have been followed to design the medium and long-term strategies for Monte Verde:

1. A joint program involving SNV, APCOB and AFIN, with Hivos' financial and strategic support. This program follows the aforementioned strategic plan.

2. Subsequently, in 2012, the Comprehensive Development Plan (CDP) of the Indigenous and Peasant Territory of Monte Verde was designed, also through a wide participatory process. As its name indicates, the CDP covers a broader range of development goals than the strategic plan. An expanded inter-institutional coordination technical group (henceforth, Technical Group) was created to bring together other programs and projects with investment interests in the territory. Technical Group participants should relate their interventions to the CDP.

Annex 3 provides a timeline of key events leading to the creation of the joint program, the creation of the Technical Group and the design of programs, plans and operational mechanisms.

A. Program Design

Spaces were established for reflection, analysis and collective construction of ideas and strategies to define the objectives and main components of the joint program in response to the complex problems of Monte Verde. Priority issues such as indigenous territorial management, production diversification and sustainable management of natural resources, and the strengths and weaknesses of the social and political organization were discussed from the perspectives of different actors. A stakeholder analysis, showing the degree of interest and influence of different stakeholders with respect to different issues, was prepared and used to identify potential partners.

The problem analysis prepared during the consultation process identified the following threats and difficulties:

- Encroachment of land by non-indigenous people.
- Illegal timber exploitation accelerating deforestation.
- Weak territorial control system typified by lack of access to computer equipment and Geographical Information Systems (GIS); lack of tools for territorial control and supervision and logistic difficulties in visiting vulnerable areas.
- Technical criteria not applied when planning human settlements in Monte Verde or when identifying areas to be protected and preserved.
- Leaders (supervisors and presidents of community forestry associations and of the monitoring body of the provisional government) lack technical information necessary for approving community forestry management plans.
- Regulation of access, use and exploitation of natural resources weak, especially in relation to territorial control, human settlements, approval of forestry management plans, and expansion of agriculture.
- Public institutions (Municipal Forestry Units (UFM), Forest and Land Supervision

Authority (ABT)) inadequately involved in controlling the illegal exploitation of timber and land encroachment.[5]

This problem analysis informed the vision for change and the formulation of objectives, action lines and actor roles by SNV, APCOB and AFIN through a participatory process. The resulting formulation is shown in the table below. The vision agreed upon is:

The Indigenous Territory of Monte Verde is governed autonomously by the Chiquitania People, taking into consideration their practices, habits and culture, allowing for the comprehensive sustainable development (economic, environmental, political and social) of men and women owners of the territory.

B. Duration, Budget and Management

In 2012, SNV, APCOB, AFIN and Hivos signed a cooperation agreement to implement the strategic plan. Hivos granted 231,000 Euros for February 2012 – January 2014.[6] Under this agreement, SNV became responsible for coordination, administration monitoring and evaluation and presentation of narrative and financial reports to Hivos. Each of the consortium members also contributed their own small resources to the plan's implementation. The consortium has gradually evolved its way of working:

"We selected an institutional leader to coordinate the project, to make it viable and not for everyone to follow their own way. As strategic partners of the proposal, we selected SNV as our executor. During execution we were assembling the network to maintain coordination and communication; we have been very careful with that, we've tried to promote links. Resources are shared for logistics and strategies. The first year it was difficult for us; for some of us it's the first time we work in a consortium such as this one, but we began to mesh together and developed activities based on needs. We know how to recognize leadership; during the business round, the leader was SNV and we developed the section concerning business training in community forestry organizations".

(Interview with member of consortium and the Technical Group).

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[5] Information taken from: SNV, APCOB and AFIN. Plan Estratégico "Gestión Autonómica Indígena del Territorio de Monte Verde", Bolivia, mayo, 2012.

[6] Hivos is the sole donor financing this multi-actor initiative to date..

COMPONENTS, RESULTS AND ACTION LINES OF STRATEGIC PLAN

COMPONENTS	PROGRAM RESULTS	ACTION LINES	ACTORS
A. Governance and Indigenous Autonomy Management	The Indigenous Territory of Monte Verde has an indigenous autonomous government, constitutionally consolidated and organized by consensus (leaders and grassroots, men and women, young people and adults), is self-sustaining, and has available management instruments designed and shared democratically	• Political advocacy • Organizational strengthening • Communication and information at all levels • Co-execution with the provisional government	Autonomous Government of Monte Verde SNV CEJIS ALAS (legal aid NGO) AFIN
B. Territorial Control and Supervision	The territory has an appropriate and efficient control and supervision system that ensures the conservation of natural resources and mitigates possible threats.	• Update of participatory plans for the use of the territory and its resources • Occupation of territory mainly by young families. • Strengthening of institutional framework for sustainable control and supervision. • Internal regulations for occupation of territory • Responsibilities for ongoing monitoring and supervision shared with the Forest and Land Supervision and Control Authority (ABT)	Autonomous Government of Monte Verde APCOB SBDA ABT (Forest and Land Supervision Authority)

COMPONENTS, RESULTS AND ACTION LINES OF STRATEGIC PLAN			
COMPONENTS	**PROGRAM RESULTS**	**ACTION LINES**	**ACTORS**
C. Sustainable production and inclusive economic dynamics	Economic-production activities in the territory generate sustainable and equitable income for the population, are compatible with the environment and guarantee livelihoods.	• Development of production planning instruments • Strengthening of priority productive chains to diversify the economy. • Strengthening of progress made in forestry management productive chain. • Development of Food Safety and Sovereignty projects • Creation of environment that is conducive to developing businesses and environmental services. • Strengthening of producer organizations and/or community businesses. • Launch of professionalization / training modules for local people and municipalities (University, institutes)	Producer Associations APCOB SNV SICIREC Municipalities ABT AFIN
D. Social Development and Infrastructure	The Chiquitania population has access to education and health in keeping with its vision and culture. Necessary infrastructure is in place.	• Strengthening of management of education system. • Linking surrounding municipalities to health and basic sanitation system. • Development of appropriate infrastructure based on zoning. • Specific interventions designed to benefit young people who have been prevented from furthering their education	Autonomous Government of Monte Verde Municipalities Sub-governorships

C. Coordination Mechanisms: Technical Group

A number of consortium actors identified the need to establish a mechanism to coordinate efforts, resources and visions between indigenous organizations and support institutions. In December 2012, the Technical Group was created. The main purpose of this body is to coordinate actions based on information exchange, problem and context analysis and to establish synergies, or at least to prevent the duplication of actions in Monte Verde.

The Technical Group is a space for coordination among actors, communities and indigenous organizations in the Indigenous and Peasant Territory of Monte Verde. It will be very difficult for new actors wishing to become involved in Monte Verde not to turn to this space in search of information and to establish minimum coordination. Participants in the Technical Group provide the following insight into its current functioning:

"When we joined the Technical Group, there were already some ongoing projects. When we came to submit our project, we realized that we were clashing with the activities of a project financed by Hivos for SNV, APCOB and AFIN, concerning governance and autonomy, which generated some confusion at the beginning. We both had contemplated similar activities. [...] during the next meeting of the Technical Group, adjustments were made and some coordination took place."

"Our interest in approaching the Technical Group is based on the need to incorporate our project in the agenda of the indigenous territorial government, and to be able to approach other organizations already working in the country. That's the reason why we were willing to participate in the creation of this platform."

D. Challenges During the Design Phase

There were a number of weaknesses in the design process of the strategic plan. There was little participation of women and young people, for instance. To fill these gaps, Hivos promoted the participation of new actors and secured the assistance of two consultants. This led to a participatory process, which culminated in the presentation of a proposal by Chiquitania women and by young people for the autonomous management of the Indigenous and Peasant Territory of Monte Verde. The Colectivo Rebeldía, Hivos' counterpart in Bolivia, joined the Monte Verde multi-actor initiative.

When questioned about what they would do differently during the initial design phase, a number of interviewees mentioned that they would integrate public actors, not included yet, in the Technical Group. Other actors felt it necessary to first articulate a minimum level of consensus and interests before expanding the Group. Indeed, many interviewees thought expanding the Group to include more actors is challenging because, as issues are discussed in detail, differences inevitably surface. Nevertheless, expansion is recognized as an important step for dealing with the wide-ranging and complex problems in the Indigenous and Peasant Territory of Monte Verde. Interviewees also recognized that Monte Verde cannot be treated as an isolated territory; there must be cognizance of its relations with external agents, even if these are not formal relationships.

Harmonizing different perspectives to set up concrete coordination between current actors has also been complex, requiring dialogue, willingness and time. Moreover, many times the vision of the actors' own projects and resources takes precedence over a common strategy and vision.

During 2013, a number of differences surfaced and the momentum gained in 2012 was lost. In the opinion of a few interviewees, the Technical Group "requires tolerance and yielding ground in favour not of isolated projects, but of a common vision in benefit

of the territory." The common vision has not been sufficiently discussed. A concrete example relates to the supervision and control of territory. There are many different points of view about how this vigilance should be organized, even among the indigenous organizations themselves. Progress on this matter has occurred largely through the coordination facilitated by the Technical Group between forestry associations and the leaders of indigenous associations. It also made it possible for a number of NGOs to share information regarding zoning, territorial control and reorganization. Technical Group members are aware of the duplication of efforts and seek to coordinate specific planned actions.

The time and the willingness to go deeper into issues to build consensus will remain a requirement as the strategic plan is implemented. Through its roles as facilitator and funder, Hivos has helped to bring the positions of actors closer. Interviewees also noted, however, that these two roles of Hivos are not always clear and should be explained to the Group.

In 2013, the Technical Group promoted two thematic dialogues with a view to analyzing complexities and areas of tension from different perspectives. While this is a step in the right direction, follow-up is still required to build consensus concerning the next steps to be taken. Interviewed actors agreed that clearer mechanisms are needed to follow-up on the agreements reached in the Technical Group. Ownership of these technical and complex issues by actors and Monte Verde's indigenous organizations requires more attention.

Indigenous leaders who were interviewed were clear that the nature of cooperation is changing. They recognize that Hivos' role has changed. Previously, grassroots organizations received direct support. Currently, grassroots organizations are demanding more autonomy and effectiveness in management, not only from the State but also from international cooperation. Some leaders recognized that internal disputes in their organizations affect their effectiveness. They expect that the Technical Group's sup-

port will foster a common approach and vision. They believe that the phase of demanding the rights of indigenous peoples is over and the phase of exercising these rights has started.

"Currently the scenarios have changed because we have gone from claiming our rights to the exercise of these rights. The support provided by the cooperation is timely because at the beginning there was doubt whether indigenous territories could be governed autonomously and resources managed sustainably. Now, we have products and results, we have taken the necessary steps. I point out the fact that we now have to organize ourselves better to improve our demand, to have bigger impact and more benefit"

(Leader of the Makanaté community)

Hivos also considers that its role has changed. At first, Hivos was perceived more as an interested donor, active in identifying and defining strategic lines. Hivos now sees itself as promoter of strategic coordination. It has not only promoted the inclusion of new actors, it has also organized internal dialogues to bring the points of view of participants in the Technical Group closer together.

E. Unexpected Conflicts During Design Phase

A number of conflicts emerged that were not foreseen at the start of the multi-actor initiative. Some of the conflicts have external sources (encroachments due to the lack of boundary signs demarcating the Monte Verde indigenous territory), but others are internal (communities engaging in activities that are "illegal" or at odds with the Monte Verde Comprehensive Development Plan). Furthermore, the construction of indigenous territorial autonomy will overlap or come into conflict with municipal territorial autonomies. These (potential) conflicts

should be addressed before they explode. Indigenous organizations should participate both in the construction of indigenous autonomy and in dealing with conflicts. These issues should also be addressed by the Technical Group.

Actors involved in Monte Verde feel that Hivos' role has been diffuse and should be clarified. If its role is that of an implementing party, it assumes part of the existing co-responsibilities; but if its role is only to provide funds, it should monitor and evaluate whether its resources are well invested and executed. If it plays both roles this should also be made clear and Hivos should assume both roles in consistent fashion.

A risk that was foreseen and has been discussed, although no clear strategy has yet been developed, relates to the need to coordinate and link the public agenda and the economic agenda of the different stakeholders in the Indigenous and Peasant Territory of Monte Verde (provisional government, indigenous peoples' organizations, communities, etc.). Some parties think

that the starting point for addressing these dilemmas should be the medium and long-term strategy already defined in the Comprehensive Development Plan of the provisional government. Unfortunately, the various players in Monte Verde (many of whom are not part of the APCOB-AFIN-SNV-Hivos consortium) have not considered this plan sufficiently while preparing their own plans. The communities of Monte Verde are not familiar with the plan either. This gap and lack of consistent reference to a common overarching framework is problematic. Certain contentious issues, such as traditional mining and other extraction-related activities have, in fact, been addressed in the Comprehensive Development Plan and its stance on these issues should be widely disseminated.

Coordination is not always smooth; sometimes, there are disagreements. Actors feel that collaboration is a long-term process that has to mature, in particular with respect to the exercise of autonomy because this requires leadership, with specific capacities in the territory, which still have to be

strengthened. Hence, the training of young people in political leadership processes is a crucial strategic long-term requirement, together with the adoption and promotion of a suitable sustainable environmental and economic-production management model.

F. Economic Initiatives

Economic initiatives and sustainable enterprises within the multi-actor initiative should become stronger in the coming years. Communities must be motivated, in particular the young. It has not been easy to identify new economic initiatives. Hivos is perceived as an actor with the potential to take this issue forward, for example, by linking enterprises that have made progress with European actors.

A number of actors have proposed an approach based on value chains. Businesses and service providers are necessary in some links of the value chain; skills training of forest producers will enable them to become clearer about what sections of particular value chains they can have more control over and which ones call for refinement of negotiation strategies to set up reliable relations and benefits sharing. A database of service providers and their offerings is needed to support decision-making on how they can be brought into specific value chains. Communities and producer associations lack the transport vehicles and heavy equipment necessary to implement forestry management plans. Analysis of select value chains may be helpful in identifying employment opportunities and potential benefits for women and youth. Efforts are necessary to map the complementarity and to develop synergies between SNV and SICIREC, Fundación para la Conservación del Bosque Chiquitano (FCBC), Fundación Amigos de la Naturaleza (FAN) and organizations yet to be identified.

The initial idea was to make market intelligence available in the Santa Cruz region. Although a number of business rounds were held, no progress was made in the systematization of key information regarding buyers. This information is essential for making decisions about the purchase and sale of forestry management plans. According to some community leaders, forestry management purchase and sale processes have not changed significantly since the multi-actor initiative began. Some important changes have occurred, in the opinion of some communities as well as of APCOB and SNV: financial and administrative management have improved, forest producer associations have been created, and accountability vis-à-vis community assembly, the control and supervision committee and the provisional indigenous government has increased.

G. Lessons Learned in the Design Phase

A long-term strategy based on the priorities of indigenous organizations of Monte Verde and of support institutions and organizations provides the overall framework for orienting actions toward a common vision and goals. It was absolutely correct to start off with a minimum number of actors (Monte Verde's indigenous organizations, SNV, APCOB, AFIN and Hivos), and to add others to this open consultation process.

All the indigenous organizations interviewed recognized the need to strengthen capacities and greater technical and political ownership.

The functioning of the Technical Group has been facilitated by basic agreements and mechanisms that enable coordination, exchange and development of synergies. During the first meetings, a regulatory framework for the Group's operation was agreed upon. Unfortunately, this framework was never systematically put into practice or evaluated in a timely fashion. During a meeting of the Technical Group in November 2013, a decision was taken to formalize the regulatory framework. In the implementation phase, the effectiveness of the framework and lessons learned will have to be analyzed.

There is a need to include "unheard voices," such as those of women and young people, in the consultation, design and action implementation process.

IMPLEMENTATION PHASE

A. Coordination and Decision-making

The Comprehensive Development Plan (2013-2017) of the Indigenous and Peasant Territory of Monte Verde is the cornerstone of the Technical Group's efforts to develop synergies among the actors in Monte Verde. Its scope also encompasses actions taken by actors not participating in the APCOB-AFIN-SNV-Hivos consortium. This includes the zoning proposal developed in 2011 by the Autonomous Municipal Government and the Foundation for the Conservation of the Chiquitano Dry Forest (FCBC). As per the Plan, exploitation and sustainable forestry management is allowed in over 85% of the Monte Verde territory, followed by cattle raising, protected areas and protection and restoration areas.[7]

The CDP is an important tool for the comprehensive management of Monte Verde, for political advocacy, dialogue and negotiation with actors and for guiding the work of the provisional indigenous government. The plan includes six development axes and strategic goals and, in a wider geographical spectrum, it integrates the potential and comprehensive development opportunities of the three municipalities: Concepción, San Javier and Lomerío. But there is a lack of ownership and openness regarding the CDP in communities and municipalities.

Communities do, however, appreciate the Technical Group's coordination of several actions. These include the formalization of territorial autonomy, the strengthening of indigenous organizations and of the provisional indigenous government, the efforts to involve women and young people in territorial autonomous management, the organization of the First Summit of Chiquitania Women and a meeting of young people from all communities, which also yielded proposals.

Coordination was expected to be more flexible during the implementation phase, as actions to be implemented in Monte Verde by CCIC, CIPJ, CICOL APCOB, SNV, Hivos, SICIREC, AFIN, SBDA and the Provisional Indigenous Government were not set in stone. However, the lack of more structured facilitation meant processes did not flow as expected. A project perspective, rather than a wider perspective, also had an influence.

Improved facilitation will bring more common-interest actions under the umbrella of the CDP. In addition, new institutional management opportunities with local and national governments, and also with the market (firms, value chain service providers, etc.) have to be identified. Better process facilitation is needed to address some key issues and bottlenecks. For instance, the Technical Group could facilitate better value chains in forestry, coffee or Chiquitania almond (Dipteryx alata). Producers are currently working in isolation to commercialize their products. Identification of strategic partnerships to connect producers with buyers and improvement in organizational

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7 CCIC, CIP-SJ, CICOL. Comprehensive Development Plan of the Indigenous Territory of Monte Verde 2013-2017. Within the framework of project "Gestión Autonómica y Diversificación Productiva en el Territorio Indígena de Monte Verde". SNV, AFIN, APCOB e Hivos. Developed by Project Agro. Bolivia. January 2013, p.94

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and negotiation capacities for commercialization are necessary. A number of member organizations of the Technical Group help to fill these gaps in an ad hoc manner. An approach to agroforestry that extends beyond the Monte Verde municipalities has also not been considered. Organizations such as AFIN, APCOB, SNV and SICIREC work along these lines, but there are also other actors, not sufficiently integrated in the multi-actor initiative, with whom a common vision could be built.

Another concrete issue that requires more facilitation by the Technical Group is the management and monitoring of agreements reached during previous meetings and the definition of priorities the agendas of upcoming meetings. A number of issues, demands and priorities, from the community or other Technical Group members, are not reaching the Technical Group. The capacity to bring this set of interests and priorities to the Technical Group, and to manage them from a common perspective is a bottleneck. This bottleneck could be cleared

by assigning the task of facilitating the Technical Group to a specific individual. The Technical Group could function more fluidly if members assign representatives to speak for them when decisions need to be made. Moreover, the Group should open itself up to other actors such as the public sector, municipalities, etc.

Some members identified the need for a tool to follow up, monitor and evaluate agreements or joint actions of the Technical Group. It would also be advisable to have a rotating link or facilitator to develop capacities in indigenous organizations and in the provisional indigenous government.

Development of economic and productive initiatives is one of the main worries and demands of indigenous organizations, the provisional government, forestry associations, community producers and artisans. Because of the centrality of this objective, customized monitoring of progress is essential. While designing the monitoring system, it would be important to remember

that other actors, such as the public and business sectors, are also active in this area.

B. Harmonization and Construction of Common Language

Processes started during the design phase helped to create a common language and vision, which, in turn, permitted efforts to harmonize proposals and to make progress in consensus building. Progress has been made in this respect; however, there is a lack of monitoring and evaluation tools to visualize increasing harmonization as an expected result of the Technical Group's work.[8]

"There are different sets of technical jargon in use… and there is no feedback, nor indicator reflecting if the communications of the Technical Group are being understood similarly by everyone. On the other hand, there are no means available to disseminate information. There is no information bulletin in Spanish or Besiro[9] for the message to reach everyone: the municipality and other actors, and sectors not included in the Group, such as the public and private sectors, small and medium size mining companies, etc."

(Interview with participant in Technical Group)

This is a very pertinent point from many different angles. It must be addressed in order to make the technical and political strategies of the participants in the Technical Group comprehensible, to position the Technical Group to play an effective advocacy role in the future, as well as to facilitate the building of a common vision and consensus within the Technical Group. Sharing of information in the simplest possible ways is imperative. Relevant, reliable, clear and direct messaging would greatly facilitate decision making and preparation of proposals.

The Technical Group has made least progress on economic development initiatives. Despite keen interest on the part of indigenous organizations, there has been little debate on this subject and little progress towards common action. Some lessons have been learned in the course of negotiations on forestry management plans and by seeking professional advice and technological and knowledge transfer through community forestry associations. The most common methodology is the training workshop, conducted by the consortium members together with forestry associations. Producer organizations think that the workshop modality is not sufficient to lead to strategy development. They think that other methodologies, tools and techniques are necessary to increase productivity and profitability, to promote the value chain approach, to generate market intelligence and to enhance negotiation skills.

There have been some advances. SNV, APCOB and AFIN have identified and promoted win-win situations for community forestry associations and companies. Consensus is being developed through debate in the process of fine-tuning proposals before bringing them to the Technical Group. However, indigenous organizations interviewed pointed out that negotiation capacities are still not at the level necessary to ensure that advantages and benefits will revert to communities as sustainable income. Discussions are beginning on how to bring other actors into the Group, how more strategic partnerships can be established and, most importantly, how the consensus among the current participants of the Technical Group can be strengthened.

Most actors agree that there is no common vision yet regarding the way forward. Leadership from the provisional indigenous

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8 From the perspective of a multi-actor initiative, the construction of a common language is one of results necessary to achieve the construction of synergies and have more effective and greater impact collaborations by a set of actors.

9 One of 36 Bolivian indigenous languages spoken in the Chiquitania

government is required on this issue because of the number of interested parties involved. An economic policy for Monte Verde has to be defined. Based on this policy, priorities for projects and sustainable economic initiatives could be identified and included as part of the CDP framework. The ownership of this process by communities and forestry associations is essential. This will not be easy as there are differences on some fundamental points. For example, some organizations still consider mining activities in Monte Verde to be viable, without analyzing in depth the long-term sustainability of these activities. This issue requires debate and consensus building by the Technical Group.

Not all communities and management plans in the territory receive business advice from the consortium. This creates competition among them and different relations with companies purchasing from middlemen. According to data supplied by SNV and APCOB and the communities, prices have improved and, with SICIREC's support, opportunities for value addition are beginning to be talked about. In 5 out of 22 communities, conditions and opportunities to increase income are being generated through more control of links in the value chain, such as by use of portable sawmills for processing.

The consortium partners think that this approach is justified because community associations can have a larger negotiation margin after receiving technical advice, business accompaniment and/or services related to business development. Hivos could play a role in the exchange of experiences with other regions and countries. A clear recommendation in this regard is that more debate and in-depth work is required on Monte Verde's sustainable economic model. Some interviewees suggested the creation of a focused inter-institutional group to address this issue. Hivos could play a key role as facilitator and promoter of new initiatives and partnerships in this area.

Another recommendation is for more in-depth work on tools and instruments for business development, inclusive business,

market intelligence, sustainable enhancement of productivity, accompaniment of business negotiation processes and marketing. The fieldwork for this case study showed a degree of uniformity in what is being demanded by communities: technical assistance and more strategic accompaniment, to be provided not only through training workshops. Associations of forestry producers would like to see the adoption of learn-while-you-do methodologies, for example. Within this framework, a simple and useful monitoring and evaluation system is recommended for the Technical Group.

C. Communication, Visualizing and Positioning Actors

The Technical Group should be positioned more clearly, especially in relation to indigenous organizations and the provisional government, as they are the primary beneficiaries of the Group's activities. The Group should become more involved and aligned with the local government. A positioning and visualization strategy could permit this type of alignment, updating advances made, discussion of proposals, debates and consensus building. Indigenous leadership should also be positioned more prominently within the Group.

The composition of the Technical Group is diverse: national NGOs, international NGOs, private enterprises, indigenous organizations and the provisional indigenous government of the territory of Monte Verde. Local as well as international NGOs are engaged in accompaniment, process facilitation, capacity strengthening, resource management and advocacy and, in most cases, joint execution. One of the main objectives of the APCOB-AFIN-SNV-Hivos consortium, as well as of CDP, is to strengthen local organizations. Hence, indigenous organizations, in addition to being part of the Technical Group, are also the main beneficiaries of projects, actions and the mobilization of resources by the Technical Group. The multiple roles played by indigenous organizations contribute to the empowerment of local actors, their accountability and their ability to supervise

their own territory. A new cooperation model and relations are being constructed that seek to optimize resources and achieve greater effectiveness and impact, based on a common vision and consensus.

D. Position and Leadership of Indigenous Actors in the Technical Group

In theory, the Technical Group must be headed by the territory's provisional indigenous government and/or local indigenous organizations. In reality, a number of workshops have been organized by participants in the Technical Group to develop proposals concerning the autonomous process, preservation of natural resources, territorial control and supervision, etc. There is no specific plan to strengthen the capacities of the provisional indigenous government to play this leadership role. This weakness has been recognized by the Technical Group and a strategy to address it was being developed during the last meeting of 2013. The relationship of the Technical Group with the public sector, such as municipalities, and with other indigenous organizations representing the Chiquitania People (i.e. OICH), is also very important.

E. The Technical Group's Communication, Visibility and Positioning Strategy

During the initial meetings of the Technical Group, a strategic use of information and communication technologies (ICT) was promoted with Hivos' assistance. Although a Facebook page was created, no progress was made in developing and implementing a strategy for increasing the Technical Group's visibility and communication. It is recommended that this idea be revisited but taking into account the Technical Group's objectives. Instead of focusing purely on ICT tools, a more strategic approach could be explored, which recognizes the reality faced by communities. Bulletins could be presented during community assemblies (combining digital and print media) in order to reach those with no Internet access. Having more presence in social networks and making more strategic use of ICTs requires

trained personnel. It may be necessary to hire in such skills or to enter into an agreement with a university in the region.

Communication within the Technical Group requires attention. Coordination meetings are not structured. There is no timely monitoring until the following meeting when other issues arise. This is unfortunate because there have been valuable conversations in the Technical Group about issues such as natural resources, bio-commerce, preservation and environmental services in which external actors were invited to participate. These types of discussions should lead to more coordination and visibility.

Although participants announce the availability of new documents, publications, tools and information during coordination meetings, more effective dissemination methods are required. New methodologies, beyond workshops and training courses, should be explored for knowledge transfer and information dissemination. ICT tools could be used to facilitate access to information, for political advocacy, and to channel citizen demands. Previous experiences of making strategic use of ICTs for indigenous peoples and of closing the digital gap should be considered (e.g., Enlace Quiché of Guatemala, Hivos' partner).

The Monte Verde multi-actor initiative would benefit from a digital platform. The three indigenous organizations demand spaces that make it possible for more young people, women and men, to participate. Use could be made of the internet access and computer equipment at the head offices of municipal seats. Such a digital platform would facilitate the dissemination of information, methodologies and tools developed, as well the CDP. The platform would enable access to strategic information, information exchange, visualization, positioning, etc.

Some of the new strategies and positioning promoted by the Technical Group are beginning to bear fruit. For instance, the APCOB-AFIN-SNV-Hivos consortium has been promoting a new commercial and business culture, one that moves away from

confrontation with private businesses to negotiation. The stereotypes are slowly breaking down:

Before, they saw us as enemy NGOs. We have moved towards a philosophy where we feel that if the community does well the company does well, and vice versa. Indigenous organizations have inserted themselves in commercialization and companies have realized that in communities where they don't have support, their businesses have fared badly because contracts are not honored and activity schedules are not complied with. The idea is to build new trust between both parties, in terms of compliance, on the part of communities towards companies as well as of these for communities. Fair trade and Corporate Social Responsibility relations are promoted and community forestry organizations receive training on negotiation tools.

To conclude, communication has been good in general terms; however, to achieve more coordination of concrete actions based on complementarity, it is necessary to work in depth on this issue. Debates should lead to a consensus regarding feasible joint actions.

F. Achievements So Far

The first years of this multi-actor initiative have served to build trust among actors and to formulate the Comprehensive Development Plan through a participatory process. Other significant achievements are:

- Progress in meeting the formal requirements related to realizing autonomous indigenous management of Monte Verde
- Inclusion of different actors with innovative perspectives for the sustainable economic initiatives component. Annex 3 summarizes perceived results mainly with respect to the Strategic Plan of the APCOB-AFIN-SNV-Hivos consortium.
- The Technical Group is recognized as a legitimate space for promoting and strengthening coordination of complementary actions with a long-term perspective. Nevertheless, it is necessary to expand the Technical Group to manage public resources and to address issues that are currently not covered.

- Hivos has drawn attention to the issue of gender, which has opened up opportunities for women and young people to make their voices heard. Consequently, women are now included in indigenous organizations as presidents, in municipality-level organizations as deputy-mayors and as part of the board of indigenous organizations.
- The Technical Group is beginning to contribute to the empowerment of local actors. Though incipient, the provisional indigenous government and indigenous organizations have begun to take ownership of a political advocacy agenda based on the Comprehensive Development Plan, and to recognize the Technical Group as a space for coordination and planning with external institutions and actors.
- A Facilitation Team has been constituted by the leaders of the indigenous organizations to spread their knowledge in their communities, and similar processes are expected to take place in other communities outside the territory.
- The fact that control and supervision is required not only of the territory, but also of the several actors working in the territory, is beginning to sink in.

G. Existing and Foreseen Challenges During Implementation Phase

There has been inadequate ownership of the agenda for autonomous and sustainable management of the territory of Monte Verde by indigenous organizations and the provisional indigenous government. So far, the agenda has been dominated by decision-making related to approval of projects. As a result, there has been little cohesion and few possibilities for developing and deepening synergies. Indigenous organizations must take a lead role in the evaluation of project proposals if cohesion is to be achieved. This would also ensure the integration of indigenous organizations' needs into projects, create greater synergy among indigenous organizations and prevent them from losing visibility.

Indigenous organizations also became de-motivated about contributing to the coordination activities of the Technical

Group because they did not agree with some of the decisions taken. Enhancing the capacities of indigenous organizations to become more involved in coordination and collective actions is imperative.

Though potential tensions between indigenous organizations, provisional indigenous government and municipalities were foreseen during the design phase, these have not been brought up at Technical Group for debate and analysis of possible scenarios. Will municipalities agree to yield their decision-making power over a considerable chunk of their territory with sparse population? How will conflicts be managed if they arise? In other regions of Bolivia, communities dwell inside the territory. This is a fact that has not been debated in the Technical Group.

Another risk is that the scarcity of international cooperation resources and hesitation in sharing financial management information may undermine the cohesion of the Technical Group. While this is not perceived as a transcendent risk, it may certainly inhibit participation.

H. Efficiency

A cost-benefit analysis is not possible because participants do not share project financial information in the Technical Group. Each organization assumes its own costs and SNV, with Hivos' financing, assumes the cost of Technical Group meetings. Indigenous organizations provide the space, etc. This cost-sharing modality could be continued. Coordination of specific activities like patrolling of the territory enhances efficiency.

Some actors agree that the inter-institutional coordination initiative has more benefits than costs. They appreciate the sharing of information by multiple actors working in the same territory.. New organizations, especially, value opportunities to know what others are doing, to become familiar with the scenario and to identify possibilities to build trust with communities and authorities.

From the perspective of indigenous organizations and the members of the provisional indigenous government, the costs of the Technical Group are high in relation to results. They point out that the Technical Group does not report the financial investments in the Monte Verde territory. Projects are submitted to the Technical Group but without accompanying budgets. There is a need for greater transparency in this regard.

There are potential conflicts of interest as well: the provisional government requires financial support for its own strengthening; the exercise of more strategic leadership requires computer and communication equipment and transportation funds. A challenge looming is the contribution of own minimum resources for the operation and capacitation of the provisional indigenous government, which would enable it to chair the Technical Group effectively and to provide leadership for the implementation of the CDP.

If the Technical Group were to adopt a more strategic planning approach, there would be more debate about the CDP's strategies and objectives, based on which consensus can be built. This would prevent dispersed efforts and a perception of isolated projects and plans. Complementarity should not emerge simply by chance or based only on not duplicating efforts. Achieving this will require the Technical Group to deepen coordination and facilitate synergetic action under the broad umbrella of the CDP.

I. Lessons Learned During Implementation Phase

Relating to actors:
- The Technical Group's role was limited to information exchange in the beginning; it has taken time for members to develop joint activities.
- For some actors, the Group's common vision has not been achieved, because though a Comprehensive Development Plan is available, it has not been debated in depth in the Technical Group, as a basis for setting priorities for coordinated actions and to develop synergies.

- Agreements reached by the Group have had little follow-up and continuity, in part because the Group's facilitation is the responsibility of just one institution, SNV.
- The Technical Group's decisions need to be made more quickly but also more rigorously. It is necessary to identify a facilitating institution, without institutionalizing or overburdening its operation with red tape. The responsibility for facilitation should not lie only with SNV. This is necessary given the aim of constructing capacities and ownership of indigenous organizational and the provisional indigenous government. Simultaneously, it would be desirable to design a system to follow up, monitor and evaluate decisions and agreements reached during Technical Group meetings.
- Those attending Technical Group meetings should have the mandate and capacity to make decisions on behalf of their institutions. It may be necessary to define minimum criteria for delegates. This point also applies to indigenous peoples' organizations.
- There is a need to generate more ownership on the part of indigenous organizations and to strengthen their organizational processes, capacities and technical tools.
- The initial design of Monte Verde was not "etched in stone." There was openness to incorporating new initiatives and to expand in the implementation phase.
- As implementation progresses, it will be necessary to integrate other actors, to address aspects of the Comprehensive Development Plan that are not presently covered.
- The value chain approach seems to be suitable from an inclusive business perspective, in so far as producers gain more power in the chain (business, investment, and other aspects such as production and product quality). The inclusion of the most disadvantaged people can be increased but this will take time.
- AFIN notes that women's participation in community forestry associations shows that they are invisible and underrepresented. The statutes of forestry organizations recognize only men as members. Women are not direct partners in management plans and have neither a voice, nor a vote. Gradual change is occurring due to increased awareness after training sessions advocating changes to current statutes and including women in key posts.

Relating to Hivos:
- Actors involved in Monte Verde feel that Hivos' role has been diffuse and should be clarified. If its role is that of an implementing party, it must assume part of the existing co-responsibilities; but if its role is only that of provider of funds, it should monitor and evaluate whether its resources are well invested and executed. If it plays both roles this should also be made clear and Hivos should take on both roles in a consistent fashion.
- This multi-actor initiative demonstrates that it is possible to link the human rights agenda with the economic agenda through a governance strategy that identifies and addresses conflicts and disputes through dialogue and consensus building. However, making the link on the ground between the human rights agenda and economic priorities remains a challenge and requires ongoing attention.
- This multi-actor initiative also shows that it is possible to develop a vision in conjunction with organizations that have been investing in the same territory for years; to go from a project vision to a strategic vision that is broad and formulated through a participatory process that includes local actors and grassroots organizations. That said, there is a need to regularly revisit this vision and to continue to strengthen it. Multi-actor initiatives take time, efforts and dialogue, aspects that sometimes are not taken into account at the start. There have been major steps forward, and it is important to be patient and remember that the foundations are being laid for long-term changes.

RECOMMENDATIONS

- An institution should be designated to manage and facilitate the Technical Group, and this responsibility can be rotated. This would help to ensure follow-up of agreements reached.

- The Technical Group should focus on a specific agenda for a fixed period of time, rather than spreading itself thin.

- Development of a communication and visibility strategy, including revisiting the proposal for the use of the ICT tools. The establishment of a digital platform can assist in the dissemination and exchange of information (including the Comprehensive Development Plan), methodologies and tools.

- Adopting and implementing SICIREC's approach to economic development will require the creation of an enabling environment. To accomplish this, more experienced actors must be brought into the Technical Group.

- Women and young people are under-represented in the Technical Group.

- Studies should be conducted to identify and promote women's participation in value chains.

- To establish the basis for medium and long-term sustainability, the business capacities of community forestry associations and other production associations should be strengthened. This is one of the most important challenges mentioned during community visits. It requires identifying and advocating in favour of training young professionals, men and women alike, in careers that contribute to the development of a sustainable economic-productive strategy for Monte Verde.

- Promote more exchanges of experiences between community forestry organizations in different regions of Bolivia.

- Innovate knowledge transfer, technical assistance and counselling methodologies, incorporating learn-while-you-do methodologies and the information and instruments created within projects being executed in Monte Verde.

- Promote transparency and accountability in the Technical Group, beginning by sharing information concerning the investment made by institutions and indigenous organizations in Monte Verde.

- Phenomena such as migration of young people, which concern the leaders of indigenous organizations, should be addressed.

- Consider political advocacy as a joint action and conduct periodic context analysis at the regional level. This will contribute to fine-tuning strategies, including the analysis of dependency on international cooperation resources, which is not just changing its priorities and dynamics, but also drastically reducing support to initiatives such as the ones being promoted by the Technical Group.

CONCLUSION

The strategy and programmatic cooperation designed by the actors and shared in the Technical Group is clearly focused on human rights and citizenship, based on the collective and territorial rights of indigenous peoples. It is part of a wave of deep structural changes taking place in Bolivia. The starting points of the "Autonomous Territorial Management" Strategic Plan of the APCOB-AFIN-SNV-Hivos consortium as well as of the Comprehensive Development Plan can be found in these opportunities.

Though what is being attempted in Monte Verde is ambitious, it builds on the opportunities offered by the context and the struggles of the Indigenous Peoples' Movement of Bolivia, including the indigenous peoples' organizations of Monte Verde. These movements have influenced the national political agenda through their demands for collective and territorial rights and self-determination. Furthermore, they have managed to establish strategic partnerships with a number of Bolivian NGOs that are investing in these longer-term structural and systemic changes. These are elements of the context that bode well for the viability of the multi-actor initiative in Monte Verde.

The possibility of contributing to a systemic change in the territory of Monte Verde, based on the Comprehensive Development Plan formulated and shared by Technical Group, is congruent with Hivos' future strategy. The initiative offers the possibility of bringing the objectives of "Open Society" and "Green Society" closer together.[10]

A number of gaps and weaknesses have been identified in this case study. Some components of the Comprehensive Development Plan are not covered by any of the current actors. Public sector actors, especially, should be integrated in the Technical Group. One of the challenges in coming years will be to make it possible to access the public funds necessary for the implementation of the territory's autonomous management process. This would decrease dependence on external (international) funds.

There is need for innovation particularly in the areas of inclusive economic initiatives and ICT and herein lie opportunities for Hivos. Proposing inclusive economic alternatives as part of territorial governance and management is a challenge that remains to be met. Processes and components currently seem to be running in parallel. Economic alternatives should be related to the other components of the Comprehensive Development Plan. Other environmental NGOs, such as SBDA, have much to contribute in this regard, as well as to the social organization for territorial management component, which should address the need to channel and manage communities' economic demands. A specific challenge to be met is to add value to agricultural and forest

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[10] Hivos' strategic plan for 2014-18 has two main themes: Open Society and Green Society. An Open Society is one that enables citizens to actively shape society and take control of their own lives through democratic institutions that support and guarantee freedoms. The Open Society implies a high quality of political decision-making and a society that embraces diversity. A Green Society is one in which citizens and institutions take responsibility for creating a sustainable society for present and future generations. The green economy offers economic development and employment while preserving the environment and citizens' wellbeing, now and in the future.

products in ways that provide equal opportunities for women and young people, while also allowing for sustainable and comprehensive forest management.

Systemic changes must take into consideration the plurality of voices of communities, and the need to capacitate indigenous organizations and provisional government to manage complex processes. Current training and capacity strengthening processes are being planned in parallel and in linear fashion.

The Technical Group can strive more deliberately for systemic change by promoting complementarities and synergies based on the discussion of ideas and identification of concrete joint actions. The coordination of territorial control and supervision by participants in the Technical Group generated expectations among community leaders as it was perceived as a new way of creating effective changes and producing valuable results. Similarly, one of the expanded meetings of the Technical Group, which involved external actors, discussed issues such as bio-commerce and environmental services. Unfortunately, there was no follow up to this meeting and it did not connect with leadership training components. Effective capacities may be developed through interaction and concrete actions, instead of just having training resources, workshops and consultations.[11]

The Monte Verde multi-actor initiative not only addresses land and territory-related conflicts, it looks for a new comprehensive development model and paradigm, in a defined territory, based on the new humans-nature relation. The initiative may be relevant in other countries facing critical problems concerning land and territory governance, and constraints to the exercise of the human and collective rights of large groups of people. Monte Verde is an inspiring experience that contributes to thinking about bottom-up opportunities for systemic change.

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All the people

ANNEX 1: INTERVIEWEES AND COMMUNITIES VISITED (FROM 17-27 NOVEMBER 2013)

NAME	ORGANIZATION	DATE	PLACE
Javier Bejarano, Raquel Trujillo, Karen Mendoza	SNV	18/11/13	Concepción
Juan Lira	Presidente AFIN	18/11/13	Concepción
Elisa Sorio	CIP Paikoneka SJ	19/11/13	Concepción
Dionisio Algarañaz, Félix Rivero Surubí and Dolores Pezoa	Presidente and Vice-president CCIC Concepción	19/11/13	Concepción
Isaías Montero	APCOB	19/11/13	Concepción
Nélida Faldin	ex CICOL leader and current Assemblyman for the Chiquitania	19/11/13	Concepción
Rubén Suárez Choré	ex CICOL president and current OTB president Community of Santísima Trinidad	20/11/13	Concepción
Rolando Vargas	AFIN, Technical Advisor	20/11/13	Concepción
Diego Gutiérrez, Mauricio Méndez, Laura Gutiérrez	SBDA	20/11/13	Concepción
Carmen Sanabria	Gender Consultant SNV-Hivos	20/11/13	Concepción
Moisés Masaí	President Forestry Company Forestal Retoños del Bosque (current). Former President Supervision Committee and Provisional Indigenous Government	21/11/13	Palestina TCO-MV
Juan Pablo Solís	PO Green Enterprises RO-SAM	22/11/13	Santa Cruz
Javier Salinas	ex PO Green Enterprises and current Hivos-RO-SAM consultant	23/11/13	La Paz
Corina Straatsma	Director Regional Office Hivos, RO-SAM	23/11/13	La Paz
Aiko	Executive Director SICIREC LTD.	02/12/13	Skype

PARTICIPATION IN MEETINGS AND WORKSHOPS

ACTIVITY	ORGANIZATION	DATE	PLACE
Meeting of Technical Coordination TCO-MV Group	• Representatives of 3 Indigenous Groups and Provisional Indigenous Government • HIVOS • SNV • APCOB • AFIN • SBDA • SICIREC	20/11/13	Concepción
Summit of Chiquitania Women	Women representatives of Monte Verde's communities, leaders of CCIC, CICOL, CIP-SJ, and community indigenous organizations	20/11/13	Concepción
Workshop organized with Young people of the TCO-Monte Verde	Young people, women and men representatives of TIOC-MV communities and community indigenous organizations	20/11/13	Concepción
Meeting to discuss preliminary results of Case Study	SNV: Gonzalo, Javier, Raquel AFIN: Rolando Vargas	25/11/13	Santa Cruz

VISITS TO COMMUNITIES PART OF THE TCO-MONTE VERDE

COMMUNITIES	DATE	MUNICIPALITY
Makanate	21/11/13	Concepción
Palestina	21/11/13	Concepción
Palmaritos	22/11/13	Concepción

ANNEX 2: KEY EVENTS DURING ESTABLISHMENT OF THE MULTI-ACTOR INITIATIVE IN MONTE VERDE

YEAR	RELEVANT EVENTS AND RELATIONS BETWEEN ACTORS
2010	• Internal discussions start taking place at Hivos to promote Multi-Actor Initiatives (MAI). • After the analysis of a number of experiences by Hivos Regional Office (RO-SAM) and by Hivos officers in Holland, the Indigenous Territory of Monte Verde was considered as the region with best potential for facilitating the emergence of a multi-actor initiative. Hivos' 20+ years' experience of supporting processes to strengthen the rights of indigenous peoples, directly or through civil society organizations in Bolivia's lowlands, was an important part of the context
2010 2011	• Hivos plays the role of promoter and initiates discussions with SNV, APCOB and AFIN to develop a joint initiative with indigenous organizations in the Indigenous and Peasant Territory of Monte Verde. • In 2011 Hivos approves a bridge project and forms a consortium with these three organizations. SNV is designated coordinator, administrator and fund manager. • Formulation of the strategic plan starts with high participation of indigenous organizations and of Monte Verde's community organizations that become committed to the process. • Hivos and SNV establish a dialogue with IUCN, SBDA and SICIREC and ask them to participate in the multi-actor initiative. • In December 2011, the Inter-institutional Coordination Group (MTC) is set up. Members include the three indigenous organizations of the Indigenous and Peasant Territory of Monte Verde, CCIC, CICOL and CIP-SJ, SNV, APCOB, AFIN, SBDA, Hivos, and Monte Verde's provisional government.
2011 2012	• The "Autonomous Indigenous Management of the Monte Verde Territory" Strategic Plan is jointly prepared and includes four components: a) Governance and Autonomous Indigenous Management; b) Supervision and Control of Territory; c) Sustainable Production and Inclusive Economic Dynamics; and d) Social and Infrastructure Development. Hivos contributes Euro 231.000 to the initiative for February 2012 – January 2014. • Hivos assumes leadership to fill gaps that appeared - gender approach, participation of indigenous Chiquitania women and young people - in initial processes. • Strategic dialogue starts between Hivos, IUCN and SNV to add new actors and the following are identified: SBDA (environmental management and zoning) and SICIREC (private company with social focus to promote agricultural systems and sustainable markets based on its experience with ArBolivia). • November 2012: a meeting is organized with all MTC participants.

YEAR	RELEVANT EVENTS AND RELATIONS BETWEEN ACTORS
2013	• January: the Comprehensive Development Plan for the Indigenous Territory of Monte Verde is submitted. It is developed within the project's framework (under coordination of SNV, APCOB, AFIN) and with the active participation of the three indigenous groups and of the provisional autonomous government. • March: Third Technical Group dialogue on "Territorial and Natural Resources Management in the Chiquitanía" to improve the knowledge base and inter-institutional coordination based on the discussion of experiences, visions and perspectives. New organizations are invited to take part in this dialogue: IUCN, Fundación para la Conservación del Bosque Chiquitano (FCBC), Fundación Amigos de la Naturaleza (FAN), and Fundación NATURA. • July: The SNV, APCOB, AFIN and Hivos consortium submit the "Governance and Economic Inclusion in Bolivia's Chiquitania Indigenous Communities" proposal to the "Non-State Actors" call for proposals of the European Union, but it was not approved. • November: First Summit of Chiquitania Women and research work/systematization of two years of a participatory process is presented, young people of Monte Verde meet, and fourth MTC meeting. The first two years of operation of the Technical Group is reviewed and follow-up agreements are reached

Own creation with documented information and interviews conducted during fieldwork in Bolivia (November 17-27, 2013).

ANNEX 3: VIEWS OF INTERVIEWEES REGARDING PROGRESS*

DESIRED RESULTS	PERCEPTION OF PROGRESS MADE (AT EFFECT LEVEL)	PERCEPTION OF WEAKNESSES OR LIMITING FACTORS
The Indigenous Territory of Monte Verde has an Indigenous Autonomous Government, institutionally consolidated and organized by consensus (leaders-grassroots, men and women, young people-adults). Governance is self-sustainable and has democratically constructed and shared management instruments.	Visible advances made in development of instruments and systems required by the Ministry of Autonomies. Monte Verde is one of only four indigenous territories that has submitted a complete application to this Ministry. The application is under process and is awaiting for approval. If approved, the territory of Monte Verde will receive tax revenues and public resources to exercise self-government	Empowerment and leadership capacities of autonomous government still need to be strengthened.

Resource management has to be improve as well.

Resource management is hampered by lack of access to instruments (like GIS, GPS), lack of resource and boundary maps, and lack of knowledge about territory and adjacent areas. |
| The territory has an appropriate and efficient control and supervision system that ensures the preservation of its natural resources and mitigates possible threats. | The efforts of the members of the Technical Group to coordinate concrete territorial control and supervision actions is recognized as an added value.. | More information exchange and coordination is necessary with more actors in order to develop a comprehensive approach to territorial ordinance as a tool for the sustainable management of natural resources. |
| Economic-productive activities, taking place in the territory, generate sustainable and equitable income for the population and are compatible with the environment and guarantee livelihoods. | Limited progress has been made in the development of a value chain approach, business development services and inclusive businesses | Still lacking: Integration of actors with experience in the Technical Group, social innovation ideas for young people. Value chain approach should be included in training curriculum.

Young people who are trained in GPS, mapping, etc., often emigrate. Long-term residents need to be trained in these skills. |

DESIRED RESULTS	PERCEPTION OF PROGRESS MADE (AT EFFECT LEVEL)	PERCEPTION OF WEAKNESSES OR LIMITING FACTORS
The Chiquitania population, owner of the territory, has access to education and health in accordance with its vision and culture. Further, basic infrastructure necessary to achieve health, education and sustainable economic development goals is in place.	Problem analysis and identification of actors and public institutions has occurred but there has been no subsequent progress. (These components are not part of the consortium's program).	At the time the case study was being prepared, neither the Technical Group nor the Indigenous Provisional Government had initiated dialogue with public institutions. Communities have strong interest in the management of health and education investments. Technical Group has these issues on its agenda

ANNEX 4: PHOTOGRAPHS

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