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Implications of Democracy in Forest Management of the Sierra Norte, Mexico

Abstract

This study examines democratic parameters within the framework of common property systems. While common property institutional rules and norms have been discussed at length in the relevant literature, democracy has not been rigorously applied to communal forest decision-making. Two forest-based communities of the Sierra Norte in southern Mexico were selected for comparison on key democratic features, including governance, leadership, inclusiveness, and trust. Both communities have taken different forest use paths, resulting in both positive and negative consequences. Their respective forest land-use decisions have been regulated by *usos y costumbres*, local practices of governance based on indigenous systems of community service. Democratic governance of community forest resources is not yet consolidated, but is well on its way for both communities. These findings bring new insight into the meaning of democracy and common property systems.

Keywords: political, forestry, common property, social conflict, environment, community forestry, Oaxaca.

INTRODUCTION

Over the years, common property literature has matured from Hardin's (1968) controversial "tragedy of the commons" to Ostrom's (1990; 1998; 2001) institutional rules for collective action and other related works. Although Hardin may have confused open access with common property systems,[1] other shortcomings of this scholarship continue to engage researchers and practitioners. One of these is the inadequate consideration paid to questions of democracy. Relatively few common property scholars have directly tackled democratic themes in their work.

In one notable exception, Hernes and Håkan (1998) discuss democratic limitations inherent to co-managed fisheries, and demonstrate that "communitarian" and "co-managed" arrangements have been inadequately problematized in terms of citizen participation or representation. Further research is needed that would analyze and possibly link democratic notions with common property theory and application. After all, both areas of study share common ground in terms of their relevance to collective or representative decision-making. It seems only natural that these two fields of research be jointly explored and extended through revealing empirical examples.

Given the centuries of work on democracy by such political science luminaries as Aristotle, Alexis de Tocqueville, Jean-Jacques Rousseau, Hannah Arendt, Pablo González Casanova, Benjamin Barber, Chantal Mouffe, and David Held, it seems peculiar that so few have situated democracy within the common property literature. Perhaps it has something to do with the difficulties of defining democracy, which remains a contested concept even after years of experimentation and consolidation (not to mention the occasional reversal) throughout the world. One definition holds democracy as a political system in which the opportunity to participate in decisions is widely shared among all adult citizens (Dahl 1991:6). This participatory notion is far from reality in most representative or authoritarian arrangements of governance. Nor does democracy mesh well with what those in the private sector equate to efficient decision-making. Yet in its purest form - fair, transparent, and meaningful civic participation in decision-making over the "public good" - democracy appears to be the *raison d'être* of common property systems.

For this study, democracy is only one part of the story. Forest management has been the focus of many common property studies (e.g., Antinori 2002; Pandit and Thapa 2004; Sánchez Pego 1995; Taylor 2000; Tucker 1999). As social and natural science researchers, we know something of how common forest property systems may function, including some of the institutional rules and norms that seem to enhance their likelihood of success. The very notion of voting rights over forest use, however, runs counter to centralized, external management regimes that largely favor profitability. Democracy can be a vague but loaded term for those accustomed to hierarchical decision-making and political favoritism, a point that became clear during this research whenever the meaning of democracy was raised.[2] Yet, if we wish to suggest improvements for the legislation and administration of forest common property systems, then we

need to ask tough questions, democratically speaking. Otherwise, we run the risk of institutionalizing inequities and injustices rather than encouraging and solidifying democracy.

It is still unclear if communal forest management would be any better for the environment or any more democratic than private forestry operations. For example, a group or even an entire community might feel cut off for whatever reason from collective decision-making. Other questions can be asked as well. How might leadership and trust affect local forest management conditions, directions, and eventual outcomes? What role do women play in these common forest property schemes? What about the possibility that democratic decisions are taken, but group actions still result in undesirable outcomes such as faulty silvicultural practices or over-harvesting?

Thus, there is a pressing need to examine key aspects of democracy in the study of common forest property systems. Such aspects include citizenship, representation, leadership, trust, transparency, fairness, equality, electoral processes, and justice, among many others. Although various case studies of Latin American common property systems have been published in recent years (e.g., Klooster 2000; Taylor 2000; Tucker 1999), inadequate attention has been paid to democratic implications. Hence, my main purpose here is to examine the poorly understood nexus between community forest decision-making and democratic governance. Key features of democracy are looked at within the context of two community forest regimes in the state of Oaxaca, located in southern Mexico. Two questions provide the basic framework for this study. Firstly, what democratic features are involved in common forest property systems? Secondly, can common forest property systems be considered as democratic?

To address these questions, community forestry development in the state of Oaxaca is first described. This is followed by a description of the research methodologies and the two communities selected for this study. The next major section is an empirical evaluation of certain democratic aspects of communal forest management, including governance, leadership, inclusiveness, and trust. It is concluded that democratic considerations have much to offer to the study of common property systems.

DEMOCRACY AND COMMUNITY FORESTRY

Political and industrial arrangements over forest resources tend to exclude people and communities from control, input, or even access to forests. Commercial forest harvesting may

not serve the best interests of local residents. Market instability of resource commodities and absentee ownership of forest industries may cause negative socio-economic impacts such as unexpected job losses (Beckley and Krogman 2002; Marchak 1983). Prevailing land tenure agreements and unequal power arrangements can also limit or restrict citizen participation.

Many forest-based communities and the groups that comprise them are often conscious "of the dilemmas and of the self-perpetuating nature of undemocratic control by externally owned corporations" (Marchak 1983:379). Nonetheless, rural people may feel helpless to do anything when faced with seemingly insurmountable power imbalances (Gaventa 1980). Then again, lacking opportunities for meaningful participation in resource management, "voiceless" people may mobilize for rights that extend beyond institutional structures and borders. Marginalized people have occasionally halted or modified environmentally damaging industrial operations, either by legal-political means or by active resistance (see, e.g., Taylor 1995).

Community-managed forests have the potential to serve as democratic alternatives to industrial forestry (Beckley and Reimer 1999; Bray 1991; Bray et al. 2003; Klooster 1997; 2000). Many authors hold that indigenous or community-based forest management could foster ecologically sustainable practices (e.g., Berkes 1989). In the South, for example, many indigenous peoples base their livelihood on forest access and use. Thus they have a vested interest in the sustainability of those resources upon which they depend. Few cases exist, though, where communities have managed to obtain ownership or control of local forests. Often local people are treated as an afterthought or as a hindrance to forestry development (Nguiffo 1998), or are assumed to be incapable of properly governing forest resources (Hardin 1968). Yet local people can contribute important sources of knowledge and experience - traditional, historical, communal, indigenous, spiritual, folk art, etc. (Berkes 1999; Carruthers 2001) - to forest management decision-making.

A community forest differs from privately run operations in at least one key aspect; namely, in the former, it is generally the eligible voting members - local citizens and/or local authorities - that decide how the forest will be managed. Authorities in a community forest operation are most likely elected officials. In some scenarios, a representative, local governing body that oversees the communal forest operations could hire professional forestry administrators that are ultimately accountable to the community. Occasionally, communities may even own the forest landbase, which has obvious advantages for local management.

How democratic is communal forest management? The answer is far from straightforward. It would appear that communal forms of governance offer at least the potential for democratic decision-making. Conversely, certain demographic features such as gender, religion, class, and residency status may limit eligibility criteria for local resource-based decision-making. Furthermore, no guarantee exists that local decisions will be ecologically sound or democratically made. Referring to the latter, poor managerial practices and corruption can affect any level of governance, and indigenous forestry operations are no exception (e.g., Klooster 1997). However, local frustrations stemming from potentially destructive social and environmental impacts of industrial forest operations warrant the need to evaluate the potential for alternative resource management systems. Community forestry could represent one such system in which interested citizens are integrated into more equitable and participatory decision-making. This premise will be tested in the sections to follow.

The Rise of Community Forestry in Oaxaca

Constitutional property rights over the territories of indigenous communities and *ejidos* (collective farms) were established at the end of the Mexican Revolution (1910-1917), including forests and lands (Chapela 1999).[3] From the 1950s until the mid-1980s, the Mexican government cleared the way for large-scale forest concessions to harvest commercially valuable forestland. Various shortcomings of this period have been previously discussed in the literature (e.g., Bray 1995; Bray and Wexler 1996; Chapela 1999; Klooster 1997). For example, restrictions were often placed on local collection of firewood. Forests were severely degraded by "high-grading," or selectively removing the biggest and healthiest trees of the most valued species. Tree planting was rarely done since it was believed that young, understory pine would grow once a few large diameter trees were removed. Communities received few or no social benefits that were promised them. As one source complained,

> "For 30 consecutive years, dominated by the forest concessions, … forest harvesting methods were exactly the opposite [of what they should have been]. The best of the forest was taken and the worst left behind. We had very high quality wood that was being used for firewood and paper" (Javier Castañeda, 46, World Wildlife Fund).

Community activism from the 1960s through the early 1980s, beginning initially in Oaxaca, eventually bore fruit for communal forest control throughout Mexico. In 1976, for example,

Pueblos Mancomunados carried out a stoppage against Maderas de Oaxaca, seizing equipment in protest for illegal logging, and went on to form the first Community Forest Enterprise (CFE) in Oaxaca (UCEFO 1991, cited in Bray and Merino-Pérez 2002). Not willing to relinquish their forest harvesting rights, industrial forestry enterprises tried to have their concessions reinstated for another 25-year period. In 1986, against considerable countrywide pressure, the national forestry law was amended to transfer forest use rights back to their original owners.

The transfer of responsibilities for forest management to Mexico's indigenous communities and *ejidos* after years of struggle was nothing less than revolutionary, although its ramifications are still not fully understood. Notable research on Mexico's CFEs includes works by David Barton Bray, Daniel Klooster, Peter Taylor, Daniel Jaffee, Gerardo Segura, Camille Antinori, Leticia Merino Pérez, Gerardo Alatorre Frenk, Francisco Chapela, and Mathew Wexler, among others. However, much of this work has concentrated on institutional and organizational rules and practices. Likewise, the transfer of forestry management responsibility is a relatively recent phenomenon. More research is needed on the socio-political, economic, and ecological sustainability of Mexico's community forestry.

Approximately 9,000 communities in Mexico have forests on their lands, from large intact masses to fragments, although no more than 12% are legally engaged in forest commercialization (pers. comm., J. M. Torres-Rojo, September 25, 2002). While still representing a minority of forested regions in Mexico, numerous communities have successfully established CFEs in the states of Michoacán, Quintana Roo, Durango, Chihuahua, Oaxaca, and Guerrero among others. With an estimated 80% of its forestlands in the hands of communities and *ejidos*, Mexico is unique in the world for communal forest management (Bray et al. 2003). Some parts of Oaxaca are especially notable in this regard, with a number of regions and the communities living among them benefiting from active local forest management. Oaxaca is one of the poorest states in Mexico, and among the top five forest producers, with more than 50% of the economically active population involved in natural resource extraction – i.e., agriculture, silviculture, farming, fishing, or forestry (INEGI 2000). The Sierra Norte has among the most successful examples of communal forestry in Mexico (Alatorre Frenk 2000; Bray 1991; Chapela 1999; García Peréz 2000).

Unlike the situation in the United States or Canada where private logging companies control and manage large tracts of forestlands, voting privileges and power sharing are now

generally extended to residents in many Mexican CFEs. Most of these depend on healthy forest ecosystems for survival and employment. For instance, Oaxacan rural communities are often characterized by strong cooperative traditions, with collective property and management structures that reinforce decision-making mechanisms (Cohen 1999). Several communities have highly developed internal and external rules that favor forest health and sustainable use.

On the other hand, serious conflicts exist in Oaxaca over forest land control and use (Dennis 1987; Klooster 1997). For example, on May 31, 2002, unknown assailants massacred 26 campesinos from Santiago Xochitelpec returning from working in San Pedro El Alto's forest operations of the Sierra Sur region. This incident was largely attributed to a land dispute among neighboring communities who had long been ignored by state authorities, according to many interviewees.[4] Other Mexican states are also experiencing conflict over forest resource use and access as a result of democratic shortcomings, industrial exploitation, illegal logging, and poverty. The case of Guerrero farmer Rodolfo Montiel, for instance, made international headlines after he was arrested, tortured, and sentenced to six years in jail stemming from his role in organizing a campaign to halt Boise Cascade's commercial logging project.[5] Such conflicts are indicative of unjust economic and political arrangements, which may generate violent reactions as a last alternative. Additionally, local conflicts over common pool resources "may result from situations where resource users find themselves without the social bonds that connect them to each other and to their communities and where responsibilities and tools for resource management are absent" (McCay and Jentoft 1998:25).

Weak social bonsds or intense community conflicts notwithstanding, inadequate democratic structures and mechanisms may also lead to poor management of common forest resources. Likewise, the type, depth, extension, openness, flexibility, and other facets of democracy may influence communal decision-making over forest use.

METHODOLOGY: A COMPARATIVE CASE STUDY APPROACH

This research was structured as a comparative case study to examine the complexities of community forest decision-making in southern Mexico. Fieldwork took place from May to December 2002 in the state of Oaxaca, southern Mexico. The two communities selected, Santa Catarina Ixtepeji and Santa María Yavesía, pertain to the Ixtlán district in the Sierra Norte region north of Oaxaca City.

Ixtepeji and Yavesía were selected based on five conditions: 1) Relatively similar geographical, biological, and socio-cultural aspects (e.g., residents of Zapotec indigenous origin living near pine-oak forests); 2) forest access and use important to both communities; 3) either sustainably managing their forests or undergoing forest conflict due to an anti-logging stance; 4) relatively high communal involvement or political activism in forest-related affairs; and 5) communal authorities and residents openly cooperative to this study. After visiting several communities that at least partially met the above conditions, Ixtepeji was chosen for its reputedly high-quality forest management, whereas Yavesía represented a contrasting situation of intense socio-political conflict over forest resources.

Research time was divided among Ixtepeji, Yavesía, and Oaxaca City, with a few interviews held in Mexico City. Home stays were arranged with local families, which helped build trust, and provided additional insights of family and community customs (for further details, see Mitchell 2004). Data collection techniques included participant observation, secondary information, conferences and workshops, and interviews. Participant observation activities included planting trees, helping in forest inspections, attending community forestry meetings, and talking with community residents and outsiders (e.g., tourists, researchers, government officials). Secondary data collected included newspaper clippings, maps, civic or communal documents, books, and videos. Several visits to other forestry communities in Oaxaca were also carried out for comparative purposes.

A total of 51 semi-structured interviews were conducted. Interviewees were purposefully selected by a "snowball technique," in which knowledgeable individuals inform the researcher of other likely candidates, these do the same, and so on. A loosely structured interview guide was used and interviews were taped. Most interviewees had some understanding of forestry management and/or Oaxacan community politics, and were employed in community governance (29%), industry (18%), non-governmental organizations, or NGOs (14%), federal or state agencies (12% and 6% respectively), or academia (8%). Interviews were later transcribed into a text document, then coded and analyzed with qualitative software. The main categories included Community, Democracy, Ecological Health, Forest Management, History, and Institutions. The coded results were then compared by certain attributes, including residency, gender, and occupation. Most important among these were comparisons between interviewees from Ixtepeji

and Yavesía (or persons knowledgeable about either community), as well as comments from "experts" in political and environmental affairs.

DECISION-MAKING IN COMMON PROPERTY FORESTS OF OAXACA

The municipality of Ixtepeji has 2,532 inhabitants (INEGI 2000), and is located about 35 km from Oaxaca. The municipality of Yavesía, located about 60 km northeast from Oaxaca City, is much smaller with 460 inhabitants (INEGI 2000). Even though they are close to Oaxaca, both communities are relatively isolated due to irregular transport and poor communication services. Most residents are of Zapotec origin, one of 17 distinct indigenous cultures of Oaxaca, although Spanish is the preferred language. Residents base their livelihoods on the cultivation of maize, beans, squash, and wheat, and may produce cattle, pigs, or poultry. In Yavesía, due to its favorable growing conditions, many residents also grow fruits and nuts such as walnuts, peaches, pears, apples, quince, and avocado. Although they have different land tenure systems, both communities are involved with common forest property systems, although they have taken different approaches to forest management. Ixtepeji carries out timber and non-timber activities on a sustainable basis, whereas Yavesía is determined to prevent commercial logging in areas they consider as their own forests.

Ixtepeji: Taking a Sustainable Approach to Communal Forestry

From 1956-82, the parastatal Tuxtepec Paper Company, or FAPATUX, commercially harvested Ixtepeji's forests as part of its 25-year timber harvesting concession. Ixtepeji regained forest control in 1983 and started experimenting with new silvicultural methods favoring pine regeneration and pathogen control (e.g., seed trees, tree planting, and other restoration activities). Ixtepeji's community forested and unforested areas now have a combined total of 21,107 hectares: 15,036 hectares are managed for timber and non-timber extraction, and 1,981 hectares are protected for ecotourism, biodiversity, and water management (SmartWood 2001). Native pine is the only commercially important species, with oak and other species mostly used for local fuelwood needs. A total annual allowable cut of 12,900 cubic meters of pine and 3,080 cubic meters of oak can be officially harvested, but generally less than this amount is cut. All forest-based activities are under the strict authorization of the Ministry of Environment and Natural Resources (SEMARNAT).

In 2001, SmartWood certified Ixtepeji's forests on behalf of the Forest Stewardship Council (FSC). Ixtepeji currently targets local and national markets for its certified "green" products, which until now, have failed to generate any additional income. They eventually hope to enter international markets, although no plan has been made to do so. In the meantime, Ixtepeji is taking full advantage of technological advancements to improve administrative efficiency, such as their use of Global Positioning Systems (GPS) and Geographical Information Systems (GIS) for forest mapping and planning purposes. Significantly, their forests are regaining both health and quality after many years of degradation during the concession years. Severe sanctions are applied to local residents who abuse forest privileges. The maximum annual allowable wood volume may not even be met if the community feels enough timber has been harvested to meet their social needs. However, ongoing problems include worker safety, inadequate drainage on forest roads, illegal hunting, and free access rights that may cause forest degradation or destruction.

Ixtepeji's overall goal is to improve their livelihoods through sustainable forest management. Forestry is now the largest income generator for local residents. Proceeds from forestry sales have allowed for investments in service provision (schools, roads, etc.), social security payments to the elderly or the sick, and annual profit shares are distributed to both workers and commoners. Logging and milling are not the only forest-based activities that occupy many Ixtepeji residents. Non-timber forest activities also provide opportunities for community residents to earn extra income. An ecotourism program begun in 1999 handles about 200 visitors a month. Other non-timber activities include collecting ornamental plants and wild mushrooms, bottling spring water, and tapping pine resin.

Yavesía: Claims of Environmental Justice

In contrast to Ixtepeji's acceptance of community-based forestry (including tree harvesting and milling) as an economic sector, Yavesía has vigorously opposed commercial logging of the local old-growth forests for over 50 years. Local forests were mainly used for domestic purposes and trees were manually cut until the 1940s. Then wood splitters, gas chainsaws, winches, and other modern machinery were brought in, and Yavesía residents began to worry that the forests would be destroyed.

In 1957, neighboring authorities and a representative from the federal Agrarian Reform office pressured the Yavesía authorities to sign a Presidential Resolution of shared territory called Pueblos Mancomunados (literally "shared lands"), a 29,430-hectare land base officially ratified in 1961. Pueblos Mancomunados is comprised of three municipalities, Amatlán, Lachatao, and Yavesía, along with five smaller villages. Pueblos Mancomunados began their CFE in 1982, but only after much of the region was selectively logged over during 1967-75 by a private company - Maderas de Oaxaca (Alatorre Frenk 2000:154-160). Yavesía residents still hope to achieve autonomy for one-third of their shared land base (9,140 hectares), which they feel is necessary to protect the forests.

Many frustrating years of negotiations followed with government agencies and the failure to come to an acceptable agreement with their neighboring communities. Don Serrano, the former leader of Yavesía's communal forest resources, and several other residents were unhappy with the decision of their community president and the official head of communal resources for Pueblos Mancomunados (both men were Yavesía residents) to allow Lachatao and Amatlán to continue logging in the early 1990s. Ultimately, they hoped to force a meeting with the Governor of Oaxaca that would pressure the Agrarian Reform to divide up the land equally among the three municipalities. In 1991, Don Serrano invited "ecological" activists - the national group 400 Pueblos under the leadership of Cesar del Ángel – to protect Yavesía's portion of Pueblos Mancomunados. Apparently, the activists held workers against their will at Las Vigas (Pueblos Mancomunados' mountain sawmill). Angered at his "stirring up trouble" by bringing in outsiders, Don Serrano's own people fired shots and wounded him, and several ringleaders were held in the local village jail for a few days. He was later incarcerated in the Ixtlán village jail from 1996-98, while several of his supporters were forced out of town by local authorities. After Don Serrano's return, he was publicly accused of "caciquismo" (regional bossism) and replaced by Mauro Cruz Hernández as communal resources representative in April 2002. Shortly afterward, Yavesía took various legal actions and held logging blockades, leading to the temporary suspension of Pueblos Mancomunados' forest operations.

Some interviewees have considered Yavesía's situation as a collective, democratic, search for environmental justice. As such, it shares similarities to other local and extra-local actions elsewhere in the world over environmental degradation and destruction. In Yavesía, a collective memory exists of various legal, political, and physical battles over environmental

rights. Documents, dates, places, and names are freely proffered when asked. One recent document frequently mentioned was a 2002 decree issued by the Federal Supreme Court of Justice, ruling that the land base be divided up proportionally in accordance with the original number of *comuneros* (from the 1961 accord). Yavesía residents feel that this judicial decree represents a victory for them, and they have been working with their lawyer and the different *dependencias* (government agencies) and neighboring communities to make this point clear. Their ecological argument is often framed in the language of ethnic or indigenous rights not unlike those espoused by groups in the Baltic region or Canadian aboriginal groups: "Yavesía wants its own territory, to be recognized as a community, as a free and sovereign municipality, in which the community will is respected" (PANOS 2002:21). Yavesía authorities have adroitly learned the power of law to frame their discourse: "Lately the citizens, the community assembly, say that there is no law that obliges or tells us that we have to accept logging" (PANOS 2002:25). With their community lawyer, the authorities have become quite familiarized with judicial and legal procedures, not unlike other examples of environmental justice elsewhere. Still, after half a century, Yavesía continues its struggle to gain control of its forests and some fear that the conflict may never be resolved to satisfaction.

NEW HOPES FOR DEMOCRACY OR ROOTED IN THE PAST?

In the following discussion to follow, four aspects of democracy in common property forest systems are discussed: governance, leadership, inclusiveness, and trust.

Governance: Blending Tradition with Modern Political Systems

Oaxaca has a total of 570 municipalities, many solely indigenous, and the largest percentage of land area under indigenous administration in the country (Government of Mexico 2000). The National Council on Population found that 76% of Oaxaca's municipalities contain high or extremely high levels of poverty as measured by income, housing, and education (Global Exchange 2000). In 1998, a total of 418 (73%) municipalities were governed under traditional customary forms of government.[6] These communities choose their leaders through *usos y costumbres* (usage and customs), local practices rooted in indigenous systems of community service that give particular importance to the judgment of elders, open assemblies, and consensus (cf. Velásquez C. 2000). These forms of government include the *cargo* system, a hierarchy of

civil and religious organizations specific to indigenous communities. For access to government resources, however, rural Oaxacan communities remain dependent on the PRI (Institutional Revolutionary Party)-controlled political system.[7] According to some sources, this has enabled local political leaders to gain power and subvert community autonomy through manipulation (Government of Mexico 2000).

Communities must govern themselves in accordance with state laws as mandated by the State Electoral Institute (IEE), and the 1996 Oaxaca Municipal Law Reform. Oaxaca is unique in this respect as the only state in Mexico to have introduced such a far-reaching municipal regulatory framework in favor of indigenous, local governance (Velásquez C. 2000). Flexible guarantees and guidelines for local electoral and administrative mechanisms are laid out. For instance, communities may choose to elect their leaders for one-, one and a half-, or three year-periods. They may also choose to govern themselves either by *usos y costumbres*, or by political representatives in a competitive party system.

Like most indigenous communities in Oaxaca, both Ixtepeji and Yavesía abide by *usos y costumbres*. Whether the *usos y costumbres* system is more democratic or not than other alternatives such as the party system is questionable. One interviewee felt that *usos y costumbres* are likely more democratic for small villages, although with some caveats:

> "Even granted that the women and young people aren't participating individually, I think … (Shutkin 2000) with a small community [you get] a consensus of what they think - *which may be wrong* - of what's beneficial to the community. In that sense, it really is more democratic."
> (Ronald Waterbury, 62, academic; emphasis added)

It was also admitted that potentially democratic conditions might not apply to larger communities. Several interviewees expressed that the new political economy in Oaxaca favors market-based, individual decisions over household or communal ones. As such, change is needed in the *usos y costumbres* system to meet the modern demands of local, regional, national, and even global markets and socio-political mechanisms.

In addition to these official mechanisms of governance, many informal ties bind indigenous residents and families in Oaxaca, as well as throughout much of Mexico and other Latin American countries. These informal arrangements provide a security system based on a web of loyalties and reciprocity distinct from most Western cultures, and even the largely dominant mestizo culture in Mexico. Various social ties and obligations enhance community

solidarity (Cohen 1999; El Guindi and Selby 1976). They also promote local autonomy, often filling voids where government or the private sector may have encroached on local affairs. The cooperative practices of traditional communities can create and/or reproduce identity, while at the same time providing footings for negotiating and coping with ongoing social, economic, and political change (Cohen 1999:4).

Common Property Leadership: "Te Chingan Los Cargos"

Leadership roles and decision-making participation are seen as necessary obligations for residents of both communities. Generally speaking, all capable adult males from the age of 18 until 60, who are also registered citizens, must participate in community leadership, attend community assemblies, and respect community rules and regulations. Local rules of forest governance are mainly self-imposed and monitored, but overseen by a *Comisariado* (Head of Communal Resources) and other CFE administrators (e.g., treasurer, forest guardian, secretary, sawmill manager, woodlands manager, tree nursery manager, financial administrator, etc.). Obligations of a *Comisariado* include monitoring and managing common land, utilization of common resources, and human settlements (the latter duty overlaps with municipality duties).

Most authorities speak proudly of their obligations as a demonstration of their commitment to serving their community. On the other hand, some also state that "te chingan los cargos" (the cargos screw you) since most positions are conducted without remuneration, or only a nominal amount is paid. This "obligation to the community" can place a heavy burden on families to make ends meet. Many are unable to farm during this time since they are expected to work long hours for seven days a week. Some must leave to work in other cities or even migrate to the United States, so that they can earn enough savings to be able to cover personal expenses during their period of leadership.

Periodic community assemblies and forest meetings in Ixtepeji and Yavesía provide opportunities for deliberative debate among citizens - at least for eligible males (women are not permitted to attend). The community General Assembly is considered as the "maximum authority" for communal resource decision-making. General Assemblies typically consist of a few hundred men in the case of Ixtepeji, or a few dozen in the case of Yavesía. Unchecked parochialism and aggressive leadership may affect the terms of debate and outcomes, but poor leaders can always be sanctioned or removed. Most attendees tend to be passive participants who

listen to others clarify their position before casting their respective vote. In a few cases, an individual's opportunity to join the debate may have been suspended as a form of punishment (say, for someone who has illegally cut community trees). This has the effect of quashing dissension. Both communities also have a Council of Elders, although with less power compared some other Oaxacan communities. In the case of Pueblos Mancomunados, for instance, the Council of Elders has had a direct and powerful role since 1993. This organizational innovation is based on traditional practices, and constitutes additional institutional and structural social capital for those communities that have one (Bray and Merino-Pérez 2002).

Not all is good news for common property leadership. In Ixtepeji, the democratic replacement of forest administrators occurs every one and a half to three years, depending upon the position, and has led to a loss of continuity and experience. New leaders need substantial time to get up to speed, often taking several months before they begin to feel comfortable in their new roles. Many of those interviewed had misgivings about their lack of experience in key issues such as financial administration and new technological improvements. Several felt that due to the complexity of forest and milling operations, nearby communities such as Ixtlán were better off for having hired permanent forest administrators.

In the case of Yavesía, the recent change of leadership has increased possibilities for citizen participation in decision-making. Some described the previous leadership structure as oppositional and autocratic, even accusing Don Serrano of *caciquismo* (regional bossism). Several of those interviewed were displeased with his tendency to go beyond typical channels of support and work with activist outsiders. Since Don Serrano was voted out, many of those interviewed now feel that they can engage more openly in forest discussions regarding political and legal strategies. Substantive issues discussed not only include what approach to take to defend their interests; more crucially perhaps, they also discuss which commercial activities should be pursued if logging is not a possibility.

Inclusiveness: How Gendered Hierarchies affect Common Property Decision-making

While generally inclusive, forest decision-making inclusiveness throughout Oaxaca suffers from one critical challenge: governance in both communities is marked the persistence of historical political practices that exclude women. Land allocation and utilization is almost the pure domain of local males. Although women can vote in general elections at state and most community

levels, indigenous women are rarely formally included in Oaxacan political processes (Vázquez García 2001). At a conference in Oaxaca City in July 2002, Alicia Barabas, a local anthropologist, mentioned that only 35 women hold positions of power in the more than 2,600 communities in Oaxaca.[8] In the 2001 municipal elections, only 10 of 570 municipalities (1.7%) elected women to the position of *presidenta* (mayor). Exclusion of women from community decision-making is a severe limitation of local forms of democracy, but it is perhaps not surprising given the cultural domination that women have experienced in Mexico (and elsewhere) for centuries.

While few women formally participate in forest management decision-making, some women do participate as leaders in certain forest operations of Ixtepeji. Economic activities led by women include mushroom and ornamental plant collection, tree nursery management, and bottled spring water production. Many non-timber forest activities provide opportunities for all community residents to get involved and earn some extra income.

Many interviewees expressed concern about the lack of female participation in positions of authority and decision-making, a shortcoming that will eventually have to be addressed. This is already happening in certain Oaxacan communities. Some communities have had such an exodus of adult males in search of work elsewhere that a political vacuum is being taken up by women (Cohen 2002). Unlike the party system, women do not have the right to vote in most villages. According to one interviewee,

> "democracy [by way of the] *usos y costumbres* system is actually an association of households, not individuals. The representative of the household is the one allowed to speak – you get a filtering up. In this case, the male head of household speaks [at village meetings]. Nobody else is allowed to speak. So theoretically, then, the will of the people is not the will of the individual, but the will of households. This is a minimal corporatist attitude - the household in the community … [in which] women are not allowed out of the domestic sphere." (Ronald Waterbury, academic, 62)

Other interviewees justify this gendered exclusion by regarding women as too emotional and taking stands without weighing the consequences. Common property meetings and elections were "issues for men." For instance,

> "[A] woman can elect someone, but there are more women then men here, so the women win [their choice of leader]. During 1990-95, [the women's preference for] authorities were elected and it was the time we got screwed. We couldn't continue in our struggle for the forest, because that was the women's decision. That's why [women] must only participate in very specific cases [in education, health, etc]. Big decisions have to be coldly made [by men]. … In political and judicial issues, we have to be careful and not let any woman shout. … It's a man's problem." (Mauro Cruz Hernández, 31, Yavesía)

While most of those interviewed were more comfortable with men as key leaders and decision-makers in forestry management, a few felt that greater political and management space should be opened to women. One enlightened local authority from Ixtepeji made the following comment:

> "All the men participate [here in decision making], but women very little, just in a few community projects. … We are finding throughout Mexico now that a woman can do a man's job, and perhaps even better. A man goes drinking but normally women wouldn't do that. So I believe they should participate, [but also] they should learn and know how the work is done. They think that we [forest authorities] are just driving around in the community truck. ... Women participating now [in forestry decision making] talk differently [with more respect for the work we do]." (Ismael Guzmán Juárez, 31, Ixtepeji)

The fact that both communities exclude women from participating in common property decision-making is problematic. Kothari (2001) observes that even when women are able to participate in public discussions, they are forced to do so in a formal and public way, still preventing them from introducing issues that challenge the existing power hierarchy. Since women are not considered to generate public knowledge in many cultures, and they internalize this "systematic hierarchization" of gender-based power, women are often found to be inarticulate in participatory discussions, thus excluding their perspectives and views from the construction of "local knowledge" (Mosse 1994:514). On one hand, gender-biased hierarchies limit women's access to resources and participation, and on the other hand, impose sexual divisions of labor that allocate to women the most tedious, labor-intensive and poorly rewarded work, as well as long hours of work.

Aside from the serious issue of official exclusion of women, the communal assemblies on forestry issues seem to have partially met the "legitimacy" benchmark described by Young. As Young puts it, "the normative legitimacy of a democratic decision depends on the degree to which those affected by it have been included in the decision-making process and have had the opportunity to influence the outcomes" (Young 2000:5-6). Additionally, political scientists such as Habermas (e.g., 1989) have focused a great deal of attention on what it means to be actively included within a "deliberative" process. This particular stream of critical theory focuses considerable attention on an ideal kind of social environment; namely, one where citizens can discuss and debate common concerns, access a wide range of information, and reflect and revise their understanding of issues.

As the above discussion indicates, political legitimacy and deliberation on forestry matters are prevalent in both Ixtepeji and Yavesía, at least for male citizens. With this increased responsibility come opportunities for inclusive decision-making, especially compared to the previous years of corporate controlled, profit-oriented forestry. Inclusion in decision-making processes is restricted by gender and geography. At this stage, it is unclear how women, non-residents, and watershed beneficiaries outside of the municipality boundaries could influence localized decision-making practices and deliberations. As forest operations become increasingly complex and geared toward global, competitive market conditions, it also remains to be seen how community forestry operations will continue to carry out inclusive, participatory forms of deliberation and management.

Trust in Common Property Decision-making

In addition to leadership and inclusiveness, democracy is also about trust, negotiation, and compromise. Shared decision-making may still occur under less than ideal conditions such as fair process or economic parity. Under such circumstances, it may be trust that is most important in community-based forestry for residents and non-residents alike. This includes trust in local authorities, in communal decision-making, in improved forest techniques, in government and non-governmental agencies, and in the institutional "rules of the game." Communal acceptance of rules is already a cultural reality in many indigenous communities, along with a social obligation for both men (and some women) to participate in local governance, as mentioned above.

The role of trust in the common property system and related literature focuses attention on the individual and the quality of interpersonal relationships (Smith and McDonough 2001). In most instances, these findings are grounded in the everyday realities of public participation procedures. Trust in natural resource decision-making may be implicitly expressed by a willingness to understand other's perspective, and to live with the decisions that are jointly derived (Parkins and Mitchell working paper).

However, while trust seems to be an essential ingredient in terms of the democratic process, some authors suggest that distrust is a more important ingredient than trust. "Distrust is essential not only to democratic progress but also, we might think, to the healthy suspicion of power upon which the vitality of democracy depends" (Warren 1999:310). In other words, the origins of the political are forged in the fires of distrust. For some, where distrust feeds fear and misunderstanding, the idea that distrust is functional to the democratic process may appear, if not antithetical, at least somewhat counterproductive. It is often hoped that distrusting relationships can be transformed in ways that individuals are able to listen to each other and to, if not agree, at least acknowledge and understand alternative points of view. Some authors caution against the tendency of those seeking trust in ways that tend to depoliticize the deliberative process (e.g., Warren 1999). If we trust those with knowledge and authority, then we become less scrutinizing, less critical, less aware of abuse and exploitation, and perhaps less democratic.

The lack of trust between certain communities in the Sierra Norte has been a persistent problem, and has inhibited any collective industrialization projects (Alatorre Frenk, 2000). Distrust was a factor in Ixtepeji when their forest operations shut down amid accusations of corruption from 1989-1993. Since then, forest leadership has gained the confidence of residents, perhaps abetted by the fact that forest revenues are shared.

Conversely, for Yavesía, distrust has acted both functionally and *dys*functionally. On the functional side, the change in leadership has increased possibilities for deliberative engagement. Previously, there were fewer opportunities for locals to influence forest leadership which some described as oppositional and autocratic, bringing democracy into question. Now, more citizens feel that they can engage in forest discussions with the current leadership to openly discuss their political and legal strategies. Substantive issues on the plate include what approach to take to defend their interests and which alternative forest activities should be highlighted. On the *dys*functional side, increased levels of internal trust (intracommunity) are contrasted by

decreasing levels of external trust (intercommunity and with other agencies). At this point, most authorities of Pueblos Mancomunados seem unwilling to sit down and negotiate with each other, which is badly needed if issues of control and tenureship are ever to be resolved. Nevertheless, although distrust may have reduced options for local residents opposed to logging, local democratic mechanisms seem to have been enhanced with the change in leadership. In this case, we observe the functional relationship between distrust and community leadership (internal community politics), but we also observe the dysfunctional relationship between extreme levels of interpersonal and institutional distrust (external community politics). A first step toward redressing this problem will involve institutional-level trust building activities, so that these communities can re-ignite the discourse on forest management in the region.

Summarizing Democratic Opportunities and Challenges

For both Ixtepeji and Yavesía, several key components of democracy seem to have been largely met, albeit with a few notable exceptions, as follows:

1. *Effective Governance*: Both communities have democratic forms of government. These are not competitive party-based systems, but rather based on *usos y costumbres*, with both advantages and disadvantages for common forest property management. As discussed, both communities enjoy a shared tradition of strong cooperative relationships, collective land ownership and management, abiding support for local forms of communal organization, and well-engrained cultural patterns that reinforce long-held decision-making mechanisms. On the other hand, such conditions might not apply to larger communities. Decision-making can become unwieldy when hundreds or thousands of voices all demand their respective input. Market demands for forest products may also require more efficient but potentially less democratic decisions to be made.
2. *Responsible and Responsive Leadership*. Most forest leaders are elected, which is uniquely democratic, unlike most industrial, private operations anywhere. This fact alone has huge implications for forest planning and management, since elected officials are held accountable to the citizenry of each community. Visionary community leadership can create social capital and relative social peace (Bray and Merino-Pérez 2002). They must also try to please government agencies such as SEMARNAT that authorize all forest operational plans. If the eligible voters are unsatisfied with their leaders for good

reason, these are punished or even removed from office. Such actions are not lightly taken, requiring a consensual vote at a General Assembly. On the other hand, while the system of leader selection may be a democratic one, no guarantee exists that elected officials will make decisions that benefit forest conservation and utilization alike.

3. *Inclusiveness in Decision-making*. Decisions over forest resources are taken inclusively for the most part. In other words, a large number of citizens are eligible and encouraged to participate in decision-making. The challenge is that common forest property decision-making is mostly limited to male and native-born holders of individual plots of farmland in the municipality. Women are kept out of key decision-making roles, and male leaders often make a rather unconvincing argument that this exclusion is necessary for cultural reasons. Furthermore, "encouragement" for communal participation is suspect, since free will is enforced through expected attendance at communal meetings and through the *cargo* system). There must also be the questioning of the frameworks within which choices are made in order to come up with new concepts of work, social organizations, and relationships. Ideally, such a query would improve the terms under which many women are obliged to participate.
4. *Trust and Distrust*. Lack of confidence in leadership is a key aspect to the internal conflicts and external conflicts that been faced by both communities. Two types of trust were noted – trust and distrust – with the importance of the latter emphasized. Distrust has pushed many communities to the brink of violence, which has tragically materialized in many Oaxacan communities arguing over land boundaries. For Yavesía, increased internal trust (intracommunity) is counterbalanced by decreased external trust (intercommunity and with other agencies). Under such an adverse climate to productive discussion and decision-making, it is unlikely that intercommunity democracy will be enhanced and consolidated in the short term.

In sum, democracy appears to have taken root in both communities, even though it has taken quite different trajectories. Given the constraints described above, such as gender inequalities in political mechanisms and unresolved internal conflicts, it would be unreasonable to state with certainty that democracy has been consolidated. Yet, it seems to be on the right path. Above all, democratization of power, economic equity, environmental justice, and improved forest ecosystem management are just a few of the many public benefits that have

resulted in the devolution of public and private forestlands to local communities with common pool resource regimes (Bray and Merino-Pérez 2002). Ixtepeji and Yavesía represent two good examples of how these democratic considerations can benefit the common good.

CONCLUSION

Two principal questions formed the based for this comparative case study of two forest-based communities in the Sierra Norte of Oaxaca – Ixtepeji and Yavesía. In the first place, it was asked which democratic features pertain to common forest property systems? Several aspects mentioned to some extent in this paper include citizenship, representation, transparency, fairness, equality, electoral processes, and justice. In particular, four aspects of democracy in common property forest systems were discussed in some detail: governance, leadership, inclusiveness, and trust. It was shown that while each aspect has particular shortcomings in the two communities studied, alternatively, systematic analysis of these offers an innovative way of examining common property forest systems.

The second question asked whether common forest property systems could be considered as democratic? Crucial limitations notwithstanding, local forest management was found to be relatively democratic. Some of the most serious democratic deficiencies were gender exclusion, internal conflict, and certain 'antiquated' decision-making practices. On the other hand, the decision-making mechanisms employed to manage and enjoy immediate and future benefits are generally participatory. Community assemblies are the main venue where majority voting (albeit, normally by male members) is conducted on crucial agrarian and forestry issues. With concerted efforts and pressures to consolidate democracy throughout Mexico, it can only be expected that community forestry operations will further "democratize" in the years ahead.

Finally, what does this research say, then, about democracy, given that Ixtepeji and Yavesía have chosen such radically different forest management alternatives? This study provides a greater refinement of this sometimes-generalized notion, using empirical examples from two forest-based communities. In effect, several models or degrees of democracy may exist. How and why these clash, interact, or complement each other can be better understood through continued research on other common forestry property regimes.

Notes

[1] According to Lotterman (2003), "Hardin assumed that common property was the same as an open-access resource. He argued that no one controlled the commons and that any villager had an incentive to put additional animals on it. … True common property, however, is sharply different from an open-access resource. No villager is free to put additional animals on the commons at will, or chop additional logs or use additional water. In true common property situations, the village or clan controlling the resource usually has well-designed and enforced rules about who and how the commons gets used."

[2] One state official practically booted me out of his office, indignantly stating, "What kind of question is that? What does [democracy] have to do with forestry or tourism? I could tell you my opinion after work over a beer, but I sure can't tell you here in my office!"

[3] Mexico's two types of social land tenure include the *ejidos*, in which land was allocated to a group of people who jointly share the land rights, and *indigenous communities* (or agrarian communities), in which the state recognizes a community's ancestral rights to land that they had occupied before colonialism.

[4] While the state government pointed fingers at SEMARNAT who had authorized harvesting permits in the area, this explanation was refuted by many of those interviewed.

[5] President Vicente Fox had him freed from prison on November 8, 2001. One of the founding members of the Organization of Campesino Environmentalists of the Sierra de Petatlán and Coyuca de Catalán, Mr. Montiel is a recipient of Sierra Club's Chico Mendes award for environmental heroism and of the Goldman Environmental Prize.

[6] This number may seem high but it accounts for only 34% of the population of Oaxaca, and reflects the state's rural/urban political split.

[7] Although the federal elections in 2000 elected President Vicente Fox of the PAN (National Action Party), the state of Oaxaca continues to be governed by the PRI party as of this writing.

[8] This conference was the Welte V Simposio Internacional Bienal de Estudios Oaxaqueños, held July 4-6, 2002.

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