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**REPRODUCING UNEQUAL SECURITY:  
PERU AS A WELLBEING REGIME**

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## **WeD - Wellbeing in Developing Countries ESRC Research Group**

WeD is a multidisciplinary research group funded by the ESRC, dedicated to the study of poverty, inequality and the quality of life in poor countries. The research group is based at the University of Bath and draws on the knowledge and expertise from three different departments (Economics and International Development, Social and Policy Sciences and Psychology) as well as an extensive network of overseas contacts and specific partnerships with institutes in Bangladesh, Ethiopia, Peru and Thailand. The purpose of the research programme is to develop conceptual and methodological tools for investigating and understanding the social and cultural construction of wellbeing in specific countries.

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## **ABSTRACT**

The article contributes to the literature on comparative welfare regimes by developing a model that recognises multiple dimensions of wellbeing, with particular emphasis on security of agency. Taking Peru as an example, the model relates a broader range of wellbeing indicators to conditioning socio-political factors; individual capabilities to negotiate the institutional landscape of state, market, community and household; and socio-political reproduction consequences. Peru is depicted as an unsettled regime because of lack of consensus over the prevailing distribution of opportunities and outcomes. The paper moves beyond a deterministic approach by analysing opportunities and constraints to an evolutionary erosion of inequalities through the gradual acquisition of social rights and political freedoms, taking social protection and human rights as case studies. It concludes by reflecting on the added explanatory power of a broader wellbeing over a more materialist welfare regime model, arguing that it brings the question of poor people's agency more to the centre of analysis.

**Keywords:** Peru; welfare regimes; wellbeing; clientelism; inequality; human rights; social protection; alienation, security of agency.

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## 1. INTRODUCTION

All societies are complex, Peru perhaps especially so<sup>1</sup>. Complexity in Peru reflects stupendous diversity of physical geography, from north to south, as well as from east to west over the Andes from the Pacific coast to tropical Amazonia. It derives from five centuries of a flawed colonial settlement which continues to structure the opportunities and mind-sets of distinct racial, ethnic, linguistic and income groups of the population. The result is a country that remains exceptionally, if not uniquely, stratified and unequal. Like a complex geological formation, the forces of modernisation and global capitalism have folded, fractured, mixed and remoulded social strata rather than obliterating them. Complexity is further compounded by uncertainty and conflict over the conduct of politics: of enduringly problematic governance failing to reconcile principles of human rights and equal citizenship with racially stratified interests. Dependent on export oriented growth and preoccupied with Western ideals of consumer affluence, Peruvians also draw deeply on the engrained economic institutions and pre-Colombian cultural traditions of what Basadre (cited in Taylor, 2007:2) referred to as “*el pais profundo*” (deep or real, rather than official Peru.) These polar reference points are brought into stark relief by mass media and high spatial mobility, sustaining widespread perception of chronic inequality in wealth, opportunity and respect. While an inspiration for outbursts of cultural creativity, such diversity also sustains an unusually high level of generalised mistrust.

The main purpose of this paper is to present an analysis of the institutional landscape within which poor and marginalised people in Peru have to negotiate their livelihoods and seek to forge some sense of wellbeing<sup>2</sup>. In so doing we also explore the extent to which lower level welfare arrangements can be regarded as autonomous from national institutions of market and state. Smallholder livelihoods, especially in the mountains, are precarious with public agricultural investment clearly oriented towards larger

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<sup>1</sup> DeGregori (2000) provides one defence of this claim. Cameron and Mauceri (1997: vii) provides another, observing that “for many years Peru has perceived itself and been seen by others as a country of unusually complex political, economic and social problems.”

<sup>2</sup> The paper thereby aims to provide a country-level counterpoint to more micro analysis of other WeD research in seven sites of Central Peru set out in Copestake (forthcoming). In so doing, it benefited more than detailed citations indicate from Crabtree (2006), Figueroa and Baron (2005), Sheahan (1999), Tanaka (2002), Taylor (2007) and Thorp *et al.* (2006) in particular, as well as updates from the Peru Support Group and Monthly reports on Peru from the *Escuela para el Desarrollo* (School for Development) in Lima.

farms and coastal export crops. Within the typology of “exit, voice and loyalty” (Hirschman, 1970) options they can migrate, engage in local level collective action and protest, and cultivate the patronage of monopoly employers, landlords, political brokers, richer relatives, NGO or government staff. Migration is a problematic exit into often harsh and contested terrain for negotiating a more secure livelihood. Many families combine all three options in a single survival portfolio. The possibility that the state will assist them in any sustained and life-changing form is remote. Meanwhile Peru’s insertion into the global economy via mining, export crops and tourism has produced volatile and exclusionary growth that perpetuates inequality and many people’s economic insecurity. Although Peru has experienced severe and destructive conflict, most recently during the 1980s, the more surprising question is arguably why these conditions have not provoked more full-blown revolution. Paradoxically, what has to be explained is not the frequency of protest and conflict, but rather the reproduction of at least some semblance of order.

This leads to a second purpose of this paper, which is to draw on Peru’s experience to inform theoretical thinking on different kinds of ‘wellbeing regime’<sup>3</sup>. The notion of a ‘regime’ that is at the heart of this paper implies a degree of system stability at the national level that is only possible through the reproduction over decades of some form of political arrangement between major interests (Kalecki, 1976). With respect more specifically to social policy Esping-Andersen (1991, 1999) developed the notion of “welfare state regimes” in OECD countries (with liberal, conservative and social-democratic variations) as a function of political settlement over core values and priorities. Gough and Wood (2004) modified these arguments by introducing a comparative analysis of welfare regimes across the globe to capture situations where lack of consensus over core values and priorities reduces the role of the state and its inability to “de-commodify” markets to meet welfare objectives. Their comparative analysis distinguished between relatively settled and unsettled societies, and was aided by the concept of an “institutional responsibility matrix” (IRM) comprising the domains of state, market, community and households in both domestic and international planes as overlapping but flawed potential providers of individual welfare, differentiated by gender and age. The more unstable the IRM, the less a

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<sup>3</sup> The paper does *not*, however, aim to classify Peru as a particular category of regime within some broader typology, being open to the idea that every country is unique. Rather Peru is used as a case study through which the explanatory power of a general wellbeing regime model can be tested and refined. Similar analysis is being undertaken in other countries studies by the ESRC WeD research group. For example, see Bevan (2006) on Ethiopia.

society is politically settled. Given the paradox of its turbulent reproduction an interesting question for Peru is where it lies on a settled-unsettled continuum<sup>4</sup>.

A comprehensive structuralist answer to this question is provided by Figueroa (2001a, 2001b, 2003, 2007). This comprises a mathematically rigorous equilibrium model of the interplay between four rational and self-interested groups of actors: political brokers, capitalists, skilled labour and unskilled labour, the two forms of labour being also racially differentiated. Economic inequality between the two groups of workers is the legacy of a foundational colonial shock, and has economic, political and cultural dimensions. The model identifies an equilibrium trap that reproduces high inequality because unskilled workers are unable to form a political coalition capable of equalising access to state education, social protection and credit across a racialised class divide. As a result they are systematically deprived of being able to benefit more equally from the fruits of general capital accumulation. Copestake (2007) summarises the model, and seeks to generalise it into an inclusion-exclusion framework that leaves open more options for change in the balance of economic, political and cultural resources between groups in state, market and community arenas, thereby admitting also the possibility of a wider range of individual wellbeing outcomes and regime changes<sup>5</sup>.

The overall structure of the paper is as follows. Section 2 provides a more detailed overview of the wellbeing regime model, including a discussion of how it departs from the welfare regime model described in Wood and Gough (2006). The remaining sections then analyse Peru's experience with reference to the four components of this model: conditioning factors (section 3); the institutional responsibility matrix (section 4); wellbeing outcomes, with particular reference to social protection and human rights (section 5); and finally reproduction consequences (section 6).

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<sup>4</sup> In Polanyi's (1944) terminology the paradox can be restated as how a society so profoundly moulded by capitalism has retained such a degree of political stability when the dehumanising effects of commodification of money, people and the environment should have triggered a more transformative social reaction.

<sup>5</sup> Powelson (1997:261-5) echoes Figueroa's analysis when he sums up his brief analysis of Peru in the following way. "Because the culture gap between elites and lower classes in Peru has been so vast, the power-diffusion process has never worked. Instead, fear and mistrust have minimized the possibilities for vertical alliances, pluralism and leverage". Nevertheless Powelson argues that Peru is better analysed as a "dual" society than as a completely "sectioned" society (in contrast to El Salvador or Guatemala, for example) because of the closer interaction between the two parts.

## 2. ELEMENTS OF A WELLBEING REGIME: THE WELLBEING REGIME MODEL

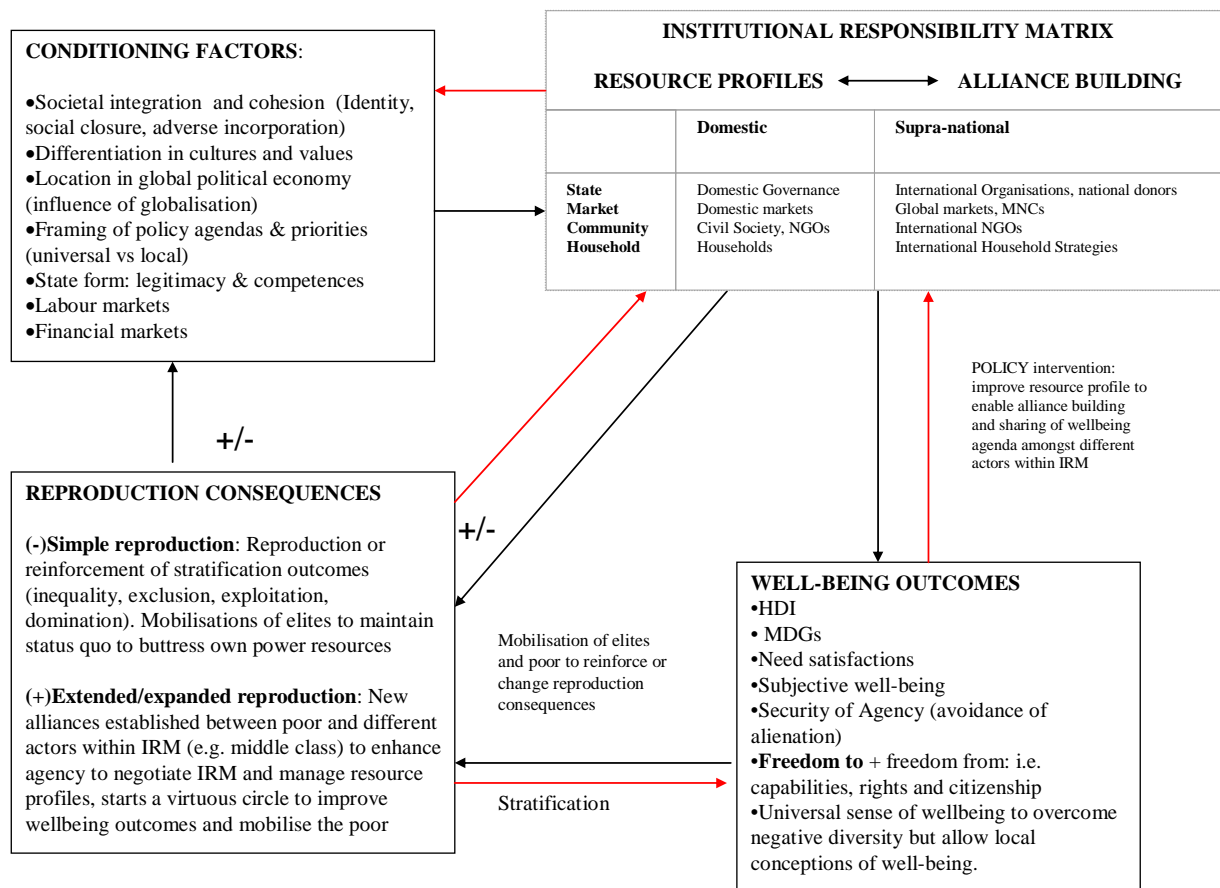
Figure 1 below sets out the basic model. Beginning at the bottom right-hand corner, the *wellbeing outcomes* of the population represent the classic objectives that social policy and social development aim to meet through social assistance, as well as investment in human resources and agency. Indicators include satisfaction of basic and intermediate needs, and reduction of poverty. In moving from welfare to wellbeing, outcomes are extended to include social identity, citizenship, participation, reduced alienation, freedom from fear and subjective wellbeing. Moving to the top right of the figure, wellbeing outcomes are not explained simply by the presence and practice of policy. Rather they are explained by agency-structure interaction within an *institutional responsibility matrix* (IRM) or welfare mix. This is the institutional landscape within which people pursue their livelihoods, and embraces the role of government, community (informal as well as legally constituted), markets and the household, alongside corresponding international actors and processes<sup>6</sup>. The welfare mix in turn is greatly shaped by the *conditioning factors* of a country (top left): including the pervasiveness and character of markets, the legitimacy and competence of the state, the extent of societal integration, cultural values and the position of the country in the global system. Finally, under *reproduction consequences* we consider social stratification and patterns of political mobilisation by elites and other groups (bottom left of Figure 1) as both cause and consequence of the other factors. Social stratification refers both to the existing distribution of power in society, as determined by the welfare mix and inequalities in wellbeing outcomes. These contribute to mobilisations of different groups and coalitions, which either reinforce (in more settled societies) or change conditioning factors and the future welfare mix of the country<sup>7</sup>.

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<sup>6</sup> The household is used deliberately as a unit of kin-based moral responsibility for its acknowledged members. Of course, at any one time, some members may have migrated for shorter or longer periods, but contribute through remittances and participation in strategic decision-making. Broader kin groups operate, for the purposes of the IRM, in the 'community' domain.

<sup>7</sup> The term political settlement refers here to the *de facto* agreements that have evolved between different classes, groups and interests over time regarding the principal ways in which the society is run, *de facto* rights are distributed and resources are allocated. Such settlements can perpetuate welfare inequalities as a reflection of power and domination. They can also enshrine concessions to politically weaker groups (and commitments to public goods by elites, as part of enlightened self-interest), as well as the exclusion of others. The stability or regime characteristics of such settlements become hegemonic in that no-one can

**Figure 1. Model for Wellbeing Regimes**



This model draws on findings from WeD research in Peru and the other three countries to extend the idea of a welfare regime (Gough and Wood *et al.* 2004; Wood and Gough 2006) towards the idea of a wellbeing regime, elaborated in four ways. First and foremost, the framework broadens the concept of welfare outcomes to include subjective as well as objective dimensions. This is important for understanding wellbeing not only as an end in itself but also as the motivation for individual and collective action (Copestake, forthcoming). It opens up opportunities for analysing diversity in the values and mind-sets of different actors within society, rather than relying on simpler assumptions of *homo economicus*. Second, the analysis gives more emphasis to change, uncertainty, political instability and the challenges of societies undergoing rapid, anomic change. Third, given the problematic nature of the state in relatively unsettled societies, the analysis goes further than is normal in social policy by recognising the importance of empowering poor, marginalised and vulnerable people themselves. Fourth, the analysis is also extended to cover non-state actors, including churches,

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imagine meaningful policy negotiation occurring outside of these accumulated, *de facto* agreements.



NGOs, charities, well established social movements, local level forms of philanthropy and mutual support. These last two points in effect add the notion of social development to social policy.

This first elaboration can be extended further by arguing that individuals' wellbeing cannot be assessed in isolation from that of others. Hence social policy is about the capacity of society-level institutions and social processes to provide preconditions for some concept of collective wellbeing. Such a proposition is akin to the view that personal happiness is some function of aggregate or utilitarian happiness and to the idea of the "common good" (Deneulin and Townsend, 2006). The scope for social engineering by the state to bring about such collective outcomes is, however, constrained by its effect on the wellbeing and agency of other actors, particularly given their greater significance in relatively unsettled societies. We are interested in the social conditions that inhibit or enhance such a quest for collective advantage – the configuration of power and the associated forms of social reproduction that contribute to the relative stability and success of different wellbeing *regimes*. However, before examining further the political problems to be overcome in establishing a successful wellbeing regime, more needs to be said about the normative significance of a wellbeing perspective for an enriched account of social policy, especially in poorer countries.

In societies where neither material resources nor social relations permit reliance upon the state for statutory rights and entitlements in the form of welfare and regulated insurance then individual agency mixed with local level collective action has to be correspondingly stronger. It is the enhancing of this agency (or set of capabilities) which has to become more central to policy analysis. If we consider the institutional landscape within which people pursue their survival, then capabilities have to be specified across the domains (domestic and supranational) of that landscape: the state itself; but also market, community and household. And all the time we have to recognise the structuration principle that successful agency will induce dynamic (in contrast to simple) social reproduction which can be positive in the sense of enhancing the utility of structures and institutions to the ongoing pursuit of wellbeing.

The key to this agenda in unsettled contexts is the distinction between 'freedom from' and 'freedom to'. In the relatively settled societies of most Western countries welfare policy has been able to focus mostly on 'freedom from', leaving 'freedom to' agendas to other social policy domains, like education and health. By contrast, any welfare policy agenda in unsettled

contexts also has to embrace a stronger social development agenda that emphasises 'freedom to' and human development objectives in a way that goes beyond investment in individual human capital, competences and skills. This is more than a semantic point about the labelling of what goes under the heading of welfare policy in settled and unsettled societies. It is about where the responsibility lies for addressing the richer capabilities and universal human needs agendas as between individual agency and collective institutions (whether state or non-state).

Unpacking this further, and at the risk of over-simplification, 'freedom from' in settled societies refers to both protection from disorder as a precondition for procedural and social rights, and to protection from basic income and livelihood loss through labour market regulation and forms of social insurance with universal benefits. But it is weaker in the former (Hegelian) and stronger in the latter (Polanyian) sense because protection from disorder is so generic and embedded in more settled societies as to be almost unnoticeable for much of the population. Procedural rights are largely assumed, and thus social rights are more easily pursued and maintained. So broadly the more obvious welfare policy emphasis in settled societies has been income and livelihoods protection, and also social protection in the narrower material resource sense. The argument in this paper is that the more limited welfare policy agenda of social protection, while necessary, is not a sufficient option even to meet security and livelihoods objectives in more unsettled societies, because the statutory, public institutions are too weak to be relied upon. There is no liberal-bourgeois consensus (or illusion) of substantive social rights supporting political equality amid economic inequalities.

Thus while welfare regime analysis has primarily focussed upon public responses to the 'freedom from' and human security agenda, the more ambitious wellbeing agenda emphasising 'freedom to' is in effect forced upon people by the prevalence of informal rather than statutory arrangements. Paradoxically, this implies that the more ambitious 'freedom to' agenda is a greater imperative precisely in those societies where it is institutionally more difficult to achieve. We come to the institutional difficulties below, but having established the imperative we need still to dwell further on the nature of the ambition.

#### Alienation, insecurity and the search for security of agency

The 'freedom to' agenda is enriched by a wellbeing conceptual framework, which has been, in turn, informed by the capabilities discourse. But it also

encourages a revival of the old theme of alienation: the widespread fear of insecurity among all classes, and more specifically the Faustian bargain faced by poorer people between freedom and security (Wood 2003). It can be argued that the whole discourse of 'development as freedom', leading via entitlement theory to the argument for enhancing capabilities, has its origin in the alienation problem<sup>8</sup>. Behind this argument lies classic social contract theory emanating from the Enlightenment philosophers. The beauty of alienation as an entry point for the analysis of wellbeing regimes is that it leads directly into the process issues of power, agency and hegemony that determine social outcomes within socially and culturally conditioned institutional landscapes. Alienation resonates more as a pervasive ontological experience of non-elites around the world than the idea of qualified autonomy. Alienation is also more obviously relational, pointing us towards the various dimensions of inequality in which agency (as opportunities, options, choices) of the many is constrained by the interests of the few. The Faustian bargain does not only express this headline problem of inequality and differential power, it also emphasises ongoing foreclosure of agency via the continuous reinforcement of dependency over autonomy. In place of the normative capabilities approach to empowerment, alienation more realistically captures actual behaviour and feelings. In an ontological sense, alienation draws attention to the threatened nature of wellbeing outcomes or the constant possibility of illbeing outcomes. It thereby takes us beyond the more limited agenda of outcomes in the welfare regime model which can be criticised for assuming a positive and unmediated connection between improvement in income, other human development indicators and wellbeing that neglects the issue of security of agency (i.e. the removal of alienation). In other words, emphasis on insecurity of agency as an ontological feature of poverty sets up a more challenging social policy agenda for unsettled societies than emphasis on poverty as solely a lack of capabilities.

### **3. CONDITIONING FACTORS**

Despite being classified as a middle income country, Peru has one of the highest absolute poverty rates and most unequal income distributions in Latin America. More than half of the population lives on less than US\$2.00 a

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<sup>8</sup> This is expressed differently, but compatibly, in Doyal and Gough's (1991) formulation of qualified autonomy as a universal human need alongside health. Autonomy as a determinant of wellbeing is also highlighted by the empirical studies of Ryan and Deci (2001a; 2001b) alongside not only competence but also relatedness: nobody is suggesting that pure autonomy is either possible or desirable (see also Devine *et al.* 2006).

day, and 20% live on less than US\$1.00 a day. Detailed poverty maps indicate poverty and deprivation is widespread, but concentrated most in rural areas of the highlands (Altamirano *et al.* 2004). With respect to income distribution, the World Bank (2003) estimates that the top decile receives 50% of total income, and the lowest decile 1.6%, while the UNDP (2005) is probably being conservative when it estimates the Gini co-efficient in 2002 to have been 0.56. Poverty is concentrated in rural areas, as indicated for example by child mortality: 24 and 45 per 1000 live births in urban and rural areas respectively (UNICEF 2004). The same report indicates that only 30% of rural children are adequately nourished.

The full significance of these statistics emerges only when they are viewed in combination with Peru's racial and ethnic diversity, reinforced by linguistic divisions. The long history of colonial Spanish intrusion into Quechua, Aymara and other indigenous populations has produced a complex racial hybridization, compounded by cultural differentiation of identities (Degregori, 2000; Quijano 2000). The process of intermingling through marriage, other liaisons, settlement and internal movement is captured by the idea of a racialised class continuum: with more Spanish culture and ancestry in the mix at one end, and more indigenous at the other end (Drinot, 2006)<sup>9</sup>. Racial positioning reinforces inequality of income and wealth, with poverty and illiteracy concentrated at the indigenous end of a continuum (Figueroa and Barron, 2005; Thorp *et al.*, 2006). At the other end a small elite has not only retained its European culture, but has actively sought to renew its 'whiteness' through immigration (Gott, 2007). While accommodating leaders from a wider background, and relying to varying degrees on alliances with foreign investors, this group has retained broad control over power and wealth in the country since Independence, not least through subordination of the interests of inhabitants of the interior of the country to Lima and the coastal belt. Notwithstanding some loosening of social structure with the demise of the pre-Velasco oligarchic state, with gradations of race and culture compounded by regional identities and recent waves of mass migration, we would argue alongside Figueroa that a deep social and cultural segmentation has remained intact.

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<sup>9</sup> We prefer the idea of a 'continuum' rather than 'hierarchy' or 'stratification' because it suggests greater fluidity, albeit subject to entrenched racial and class barriers. Reference to 'class' on the other hand is not without problems, because it suggests a rather stronger consolidation of 'class for itself' proletariat and bourgeois interests than is true for contemporary Peru compared to other capitalist societies.

Sources of variation to this general picture are the upland mining centres and some jungle areas, which offer greater opportunities for upward mobility and cultural mixing through employment. However, at the same time commercial mining and farming activities controlled from Lima and abroad are also the source of recurrent conflict over resources that often have racial and ethnic dimensions. Important variation also exists between regions, compounded by the presence of additional minority groups, although the key point is that geographical remoteness is not the fundamental source of Peru's social stratification; hence migration, urbanisation and better telecoms alone will not reduce it. Cultural dualism translates into political subordination, economic inequality and a fundamental problem of institutional legitimacy. Problematic state legitimacy, widespread distrust of broader institutional arrangements and the narrowness of the legally regulated labour market overlaid onto a highly unequal ethnically diversified society with culturally structured forms of social exclusion are all indicative of an 'unsettled' society in wellbeing regime terms. To paraphrase Quijano (2000:229) "The trouble is that the Eurocentric perspective, adopted by [Peru's] own dominant groups has led them to impose the European model of nation-building upon power structures that were organised around colonial relations between races." In other words, a basic value consensus about rights to wellbeing and institutional responsibilities (or correlative duties) for delivering them is missing: the preconditions for a political settlement capable of delivering universal improvements in wellbeing are weak. And in a society dominated by strong ethnic and cultural identity, social closure and mutual exclusion, the lack of horizontal social cohesion undermines the prospect of improved vertical political integration. This is reflected in the configuration of political parties as well as in the class structure. The nation-state within which a political settlement is required remains too deeply divided. The integration problem is reinforced by the increasing significance of globalisation, with different parts of the society located differently in the global political economy of opportunity, recognition and social identity.

## **4. NEGOTIATING THE INSTITUTIONAL RESPONSIBILITY MATRIX**

### **4.1 State legitimacy**

In this section we focus particularly on the extent to which the state is regarded by its citizens as an actual or potential force for advancement of the common good in society. Orthodox social policy, with its focus on taxation and spending (particularly social protection) generally assumes the existence of some form of social contract of this kind, no matter how flawed.

In contrast, in more unsettled societies it is necessary to review how far the state is ignored, by-passed, manipulated, distorted, co-opted by a minority or used as a source of rents for a privileged few, and furthermore to consider the extent to which this is regarded by all those involved as normal. The role of the state is also explored further in the discussion of social protection and human rights in Section 5.

For those at the bottom of Peruvian society the state and its agents are at worst a source of predation (DFID and World Bank, 2003) and at best a straight-forward patron, manifest in the symbolic status of the president as chief provider (Arambaru *et al.*, 2004). Even at the very top, among the educated minority, these views are more common than a more liberal-democratic view of the state as implementer of transparent policy, periodically tested for value at the ballot box. For the majority of people between these extremes its role is more ambiguous: indeed a realistic analysis of the state in Peru arguably begins with the insight that deliberate ambiguity as well as uncertainty of street level outcomes is key to its effectiveness in reproducing unequal security (Poole 2004). The “frustrated achievers” identified by Graham and Pettinato (2002), who are characterised by above average income mobility but below average subjective life satisfaction, are an indication of how self-improvement is undermined by continued lower social status, not least in the way they are treated as citizens by the state.

Recent political history in Peru confirms the thesis of an ‘unsettled’ regime, with more autocratic government (under military presidents from 1968 to 1980, and Fujimori in the 1990s); interspersed with more democratic government under Belaunde and García in the 1980s, and from 2000 onwards under Paniagua, Toledo and most recently García for a second time (Arredondo, 2005). The first of these periods witnessed agrarian reform, but also the failure of a nationalist agenda to strengthen domestic industrial interests, with government legitimacy eroded by economic failure as much as a lack of democratic process. The return to democracy under the Belaunde and García governments witnessed halting neo-liberalism, the feeding of elite interests, an extension of clientelist politics based on populist social programmes, the rise of terrorism, and harsh but largely ineffective army counter-measures. This paved the way for Fujimori’s bandwagon election as a populist outsider in 1990. His achievements on two fronts were dramatic. On the economic front he assuaged the international financial community, curbed public expenditure, rescheduled the national debt, tackled the hyperinflation, linked the *so/* to the dollar and took measures to

attract foreign investment. At the same time he delivered on his promises to restore political stability by quashing *Sendero Luminoso* and other terrorist groups through a more deliberate and confident deployment of the army. Together these outcomes laid the foundation for sustained economic reforms and steady outward-oriented economic growth, interrupted only temporarily by contagion effects of the East Asian crisis in 1997.

However, these successes did not translate into an improved climate for deliberative politics or social development. The *autogolpe* of April 1992 conferred on Fujimori virtually dictatorial powers. He dissolved Congress, suspended the constitution and temporarily closed the judiciary. Thus began an era of increasingly corrupt, clientelist government. With little opportunity for broader political party mobilisation Fujimori undermined the legitimacy the political process and used state patronage to co-opt grass roots social self-help movements. Already much weakened in the 1980s the “destructuring” of political parties and other civil society organisations continued (Tanaka, 2002). It is not surprising, therefore, that Fujimori’s shock resignation amid the flood of video revelations of corrupt practices prompted unleashed a wave of pressure for political reform. At the same time, there were fears of chaos and anarchy in the potential flood of political parties, often with only regional and sectional appeal, wishing to enter elections. The interim Paniagua government of 2000-01 found itself attempting the impossible task of appealing to elite, business and educated middle class interests at the same time as the wider public interest without recourse to the populism, clientelism, corruption and blackmail that Fujimori and Montesinos had raised into a precise, if dark and eventually self-destructive, science (McMillan & Zoido, 2004).

After two decades of decline and emaciation, rehabilitation of the political parties was never going to be easy; and more than higher barriers for registration were needed to counter their fragmentation regionally and through patrimonial allegiance to dominant personalities. Toledo represented a return to old fashioned Latin American populism: using his *cholo* social identity to build mass recognition (if hardly loyalty) through the media, and dependent on opportunistic broking within the established political and technocratic elite, to construct any semblance of a functioning government. His weak rhetorical skills and inability to rise above the endless infighting, political scandals and social conflicts undermined not only his personal appeal but contributed to further erosion of loyalty to the political class, despite its success in preserving relative economic and political stability. García's return to power in 2006 partly reflected the resilience and

national reach of APRA, as well as a perception that no other party was better able to hold out the prospect of political stability.<sup>10</sup> But the far more striking feature of the election campaign was the speed with which Humala achieved prominence as García's main rival by appealing to a popular sense of alienation, particularly in the south of the country and in rural areas. Regime stability was maintained because he triggered both racist alarm bells (of the kind described by Gott, 2007) and the instinct for self-preservation of what Taylor (2006) refers to as the solid pip-bearing core of the otherwise rotten apple of a political establishment.

## **4.2 Market embeddedness**

Compared to political reform, it can be argued that more progress has been made in the last decade on the economic front, through efforts to addressing pervasive entry barriers, monopoly, preferentialism and discrimination in markets as well as to improve revenue collection systems (e.g. Webb in Crabtree, 2006). This has gradually enhanced the potential to use public spending to equalise opportunity and the tax system to redistribute resources. However, the key feature of markets for labour, finance and goods in Peru is not so much that they have been governed by personalised relations in which social networks determine outcomes as much as price, skill, competence and quality. Rather it is the extent to which these social relations are themselves fragmented on the basis of race, ethnicity, age and gender in a way that is inflexibly hierarchical: with differences actively protected by those enjoying higher status. Second generation economic reforms started during the Fujimori regime have addressed some of these problems in some sectors: mobile phones, pharmacies, fast food, supermarket retailing and microfinance being examples of the new, fast growing and more colour-blind businesses. However, their outreach remains limited, particularly in rural areas, and their effect on scale, quality and security of overall employment is at best ambivalent.

Here we focus our comments particularly on the labour market and the limited reach of legally regulated labour standards. Peru's comparative advantage in natural resources has generally resulted in an adaptation to globalisation that has been profoundly divisive, stimulating growth through investment in relatively capital-intensive activities and limiting its

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<sup>10</sup> The American Popular Revolutionary Alliance (APRA) is the oldest surviving political party in Peru. Generally, centre-left and social democratic its core of devoted followers give it the character of a social movement, distinguishing it from the more opportunistic membership of most other Peruvian political parties.



competitiveness in labour-intensive manufacturing of the kind that has underpinned East and South East Asia's economic growth pattern. Mining is substantially owned by foreign capital, although domestic businesses retain control of important ancillary services. To the extent that large firms are forced to operate with some reputational eye on international labour standards, then they offer some security and some additional social services to some of those they employ directly: likewise some large commercial farming, fishing, processing and manufacturing employers. Otherwise, formal employment is confined to government itself, infrastructure, finance, tourism, large-scale retailing in Lima and the larger cities, and the rapidly growing private education and health provision. These sectors all offer some prospect of public or private social insurance provision in terms of sickness agreements and pension arrangements, and a corresponding ability to raise loans and personal insurance in the financial sector. But they are a small proportion of the total labour force in the country. Even in Lima the vast majority of workers live in shanty towns characterised by petty trading, small-scale, artisanal services, unskilled manual labour casually employed and overall under-employment. Graduation into more regulated employment is constrained on one side by the slow rate of creation of such jobs, and on the other by barriers of education, language and literacy often underpinned by relative poverty and racial discrimination.

It would be wrong to infer from the above that the informal labour market represents complete anarchy and universal livelihood insecurity. Poor people have to rely more upon family resources, including remittances from migration, resort to collective action in defence of resources, and fall back on clientelist dependency within supply chains as well with government officials. Public works and nutrition programmes reflect government and international recognition that the labour market cannot be the basis for social insurance. These structural conditions profoundly affect poor peoples' values, perceptions, social identity and sense of wellbeing. But the causality is complicated: do we assume that institutional weaknesses in the state and market arenas influence choice in the community and household arenas of the IRM? Or do we conclude that subjective preferences for community and household are so embedded as to explain the weakness of state and market precisely because they are not culturally favoured as institutions of first choice due to the enduring strength of primordial loyalties and ties? We suggest it is more accurate to view the relationship between apparent structural determinism and apparent cultural drivers as iterative. In other words, adaptive preferences for collective action, reliance upon

personalised relationships, forms of migration moulded by social resources and personalised networks rather than abstracted social capital, the instrumental as well as intrinsic value of geographical identity and other forms of affective solidarity (including religious affiliations) are products of history, as well as a function of personal experience in the search for institutional room for manoeuvre.

### **4.3. Civil Society: festivals and religion**

Evidence for this iterative complexity can be found, *inter alia*, in *fiestas* and churches. *Fiestas* are deeply symbolic of community identity and indeed collective autonomy. Of course, they provide patronage opportunities, reinforce gendered hierarchy and reflect other divisions. But in a fission-fusion model of community they are fusion events - a celebration of the durability of village or neighbourhood identity. They reinforce the idea of community coping in adversity and looking after its own in the context of institutional weakness elsewhere. Symbolic capital manifests social capital, with a strong implication that this does not extend in a secure and trustworthy way beyond. In addition to this functionalist interpretation, the *fiesta* offers hedonic as well as eudaimonic benefit to the revellers - through anticipation, actuality and memory. It is an end as well as a means, a comfort and an affirmation of a sense of security capable even of temporarily transcending racial class divisions (Wood 2007b). Many migrants make a big effort to return, as well as serving as an important source of festival finance. In Peru, *fiestas* are connected to the religious and seasonal calendar, and in a spiritual sense they connect the local to the universal. The returning migrant embodies that connection, acknowledging a sense of 'home' and identity. Of course such returns rekindle interpersonal tensions and personal crises. But if all else fails in the wider world, then a retreat option of a sort remains.

A deconstruction of the 'church' provides additional insight. With its colonial origins the Catholic Church is rooted in the power structures of both community and state, offering a spiritual justification for an unequal material order. It has readily accommodated institutions of patronage, clientelism, and patriarchy. It has colluded in the social and cultural reproduction of vertical and horizontal inequities, endorsing the barriers to integration, convincing their congregations of a natural hierarchy and inculcating respect for their leaders and betters. This has been additionally managed through philanthropy and charity rather than mobilisation for rights - through the reproduction of informal rather than autonomous security. Of course, liberation theology, where it occurred, survived and thrived, set itself against

this traditional role, encouraging conscientisation or the “capacity to aspire” (Appadurai, 2004). Indeed, we shall note later in the paper how active this stream within the Catholic Church has been in the human rights movement in Peru, especially at local levels.

As elsewhere in Latin America, Peru has experienced rapid growth of Protestant (especially Pentecostal) churches. Like liberation theology its presence can be transformatory: forcing communities to accommodate religious pluralism and ideas conducive to wider awareness of citizenship rights and demands for greater accountability (Levine, 2003). But the rise of Protestant churches can also be viewed as a symptom of less progressive change, a combination of *anomie* and alienation. In rural areas, their growth has been accelerated by the terrorist violence. In shanty towns they can also be viewed as a response to transience, insecurity, instability and uncertainty. Without the value of place, other forms of solidarity, affective happiness and spiritual comfort are sought. The millenarian aspects of the radical Protestant churches offers this sense of replacement community, through congregational participation and a stronger sense of justice in the hereafter, which does not seek to validate the material basis of unequal order on earth.

The sense of injustice about contemporary inequality is intensified when compared to previous generations by rising literacy, mobility and migration, urbanisation and ‘rurbanisation’, media access and observational proximity to wealth and to success. The cognitive experience of relative deprivation is a function of this exposure to other lifestyles, with which poorer people negatively compare their own. Such negative self-conceptions translate into feelings of inferiority, lack of self-respect, loss of dignity, shame and humiliation. The world is very familiar with this equation, say, in the context of Palestinians confined by Israeli and US policy to the marginal zones of the West Bank and Gaza. However the argument here is that this equation is generic, and that it reproduces alienation and 'millenarian' accounts of injustice which appear in different forms all over the world<sup>11</sup>.

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<sup>11</sup> Although the term 'millenarian' has a stricter meaning about belief in the 'saviour' coming to solve current problems of poverty, deprivation and alienation, we are using the term to refer to wider socio-cultural processes, while not also losing aspects of the stricter meaning. Thus millenarianism is associated with cults, and (via shared perceptions) with social identity. It is associated with intense spiritual and metaphysical beliefs, and therefore in religious terms with more fundamentalist, fixed, literal or reductionist interpretations of scriptures as guides to human purpose, moral behaviour and wellbeing. To the extent that such beliefs constitute what Weber called 'value rationality', so believers are offered frames of meaning in which suffering and deprivation during life can be endured *en route* to the cure in the life hereafter.

#### 4.4. Households and the experience of migration

Andean rural households have been extensively studied as the basis of livelihood security and a moral economy of reciprocity (e.g. Mayer, 2002). Here we focus on an account of its extension and transformation through migration. Lockley (2007) reviews the wide variety of patterns of migration and emphasises the often brutal wellbeing trade-offs that it entails, particularly in terms of the sacrifice of family relationships and quality of living environment in pursuit of better employment and education prospects. As a form of livelihood diversification, migration also influences Peru's institutional landscape. It changes the status of migrants in relation to the state, alters their position in the labour market, reconfigures community, and reduces some forms of collective action and patronage while opening up others. Migration also impinges upon the local-universal construction of wellbeing, acting as a mechanism for the transmission of ideas, values, resources and opportunities. Access to material resources are altered, social skills change, other values and cultures are witnessed. There is some shift from *gemeinschaft* to *gesellschaft* (Alvarez, 2007). However at the same time, it is grossly inaccurate to depict this as a simple modernising shift from localised-rural to urban-cosmopolitan culture.

There is no single simple answer to how far migration in Peru has provided opportunities for upward mobility and improved social cohesion. Figueroa's model of social exclusion highlights that physical movement is not accompanied by social mobility: labour market dualism is being rooted in racialised class interests that span town and countryside alike. Confronted with barriers to employment, migrants are unable to jettison informal family-based coping mechanisms: visits home and remittances in turn acting as constraints on saving, education and individualistic transition. But in other cases, extended family networks and regional associations constitute the indispensable networks through which land, jobs and self-employment opportunities are located. Meanwhile, international migration offers new avenues for capital accumulation, and a means of escape for those who might otherwise contribute to stronger domestic political mobilisation.

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Endured in the sense of offering dignity in suffering by attributing the 'victim' condition to the exclusionary machinations and discrimination of others (e.g. via capitalist globalisation unmediated by a benign state) while acknowledging that such experience is only temporal and finite. In other words, powerlessness on earth will be compensated for by power, or at least reward, in heaven.

#### 4.5. Summing up.

This brief and selective examination of the IRM in Peru indicates turmoil, transition and uncertainty across the institutional landscape. In one sense the reconfiguration of Peruvian society via migration has been occurring over several decades now, and there is some stabilisation in relationships and institutions at the settlement level, popularised both by case-studies of collective action in *Villa El Salvador* and by Hernando De Soto's advocacy of property right formalisation. However, even where there have been steady trajectories of this kind they must be viewed in the context of increasing labour market insecurity, delinquency, economic polarisation and state support for vulnerable families that has been sporadic, clientelistic and uncertain.

These trends have been reinforced by the differential aspects of globalisation. On the one hand, improved internal security, macroeconomic stabilisation, fiscal incentives and resurgent commodity prices have encouraged a renewed expansion of foreign direct investment, not only in mining and export-oriented agriculture but also in retailing, banking, telecoms and other services. Meanwhile it is precisely the same macroeconomic strategy that has constrained social spending, while the politics of adjustment and pressure for tighter targeting of social spending have exacerbated clientelism. In the context of an increasingly casualised and fragmented labour market insecurity among poorer Peruvians is as pervasive as ever. This in turn compels poor and vulnerable people in Peru to seek material and spiritual security in other domains of the IRM and to construct their ideas and hopes for wellbeing accordingly.

In understanding the wellbeing regime in Peru through this analysis of individual agency or lack of it there are two points to emphasise: strategic and contextual. First, strategically, we should give more emphasis to people's social and cultural resources, to the potential role of non-state actors and of alliance building across ethnic identities as part of larger political formation. In the sense that politics is about linking one's own specific interests to more universal ones, the capacity for alliance building between poor people and non-state actors (and their supranational supporters) is crucial. But secondly and contextually, as a feature of unsettled societies these new institutional domains are prone to the same discretionary and arbitrary rules and practices that they experience in the arena of state, market and community (Wood, 2000; Wood and Gough, 2006). Poor people have to negotiate their way round this contaminated

landscape weighing up the likelihood that to the extent that they succeed in forging alliances and crossing social boundaries they do so only on adverse terms that can reinforce their alienation.

## 5. WELLBEING OUTCOMES

Section 3 started with a brief inventory of standard welfare indicators for Peru, but in advancing conceptually towards the idea of a wellbeing regime, this paper advocates a more ambitious policy agenda that requires an additional set of indicators. We have argued that in more unsettled societies the enhancement of agency and removal of alienation is paramount, and with it the shift to a perspective that addresses not only enjoyment of outcomes but motivation to participate actively in the means to achieve them. This also critically means that while the arrow in Figure 1 may go from the IRM to wellbeing outcomes, it crucially points in the reverse direction too. Many writers are heading in a similar direction by advocating enriched measures of wellbeing in support of a social development agenda<sup>12</sup>.

With reference to Peru, Figueroa asserts that inequality and poverty persist in large measure because excluded unskilled workers' lack incentives to take collective action in pursuit of their rights as citizens, particularly to demand more equal access to public education, social assistance and financial services. His explanation for this failure of collective action is partially an appeal to the idea of a culture of poverty arising from the resilience of traditional forms of discrimination<sup>13</sup>. Secondly, he argues that poor people have less time to devote to "higher" needs in the sense popularised by Maslow. Third he appeals to a free-rider problem, described by Lichbach (1998) as the "rebel's dilemma": why risk leading a political movement, rather than piggy-backing on the leadership of others? All these arguments are about agency and rest on questionable psychological assumptions. The culture of poverty argument has been attacked for essentialising poor people<sup>14</sup>. The Maslowian idea of a universal hierarchy of

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<sup>12</sup> See, for example, Schaffer and Huang (1975) on access, Sen (1985) on capabilities, Doyal and Gough (1991) on autonomy, Moser (1998) on asset vulnerability, Ryan and Deci (2000a&b; 2000b) on autonomy and relatedness, Wood (2003) on security, Copestake (2006) on inclusion/exclusion and McGregor (2004) on resource profiles.

<sup>13</sup> A linked argument is that poverty encourages a shorter time horizon, reinforcing a willing compromise with what works, including relationships of dependency.

<sup>14</sup> On the other hand, it has been revisited by psychologists as an empirical hypothesis (Palomar Lever et al., 2004; Burton and Kagan, 2005). The idea that poverty can be reinforced by lowered aspirations is also enjoying something of a renaissance (Rao and Walton, 2004: especially chapters by Appadurai and Douglas).

needs has also been the subject of extensive criticism within psychology as well as from other disciplines (e.g. Doyal and Gough 1991). Third, the rebel's dilemma was challenged even within economics by Hirschman (1982) for neglecting the extent to which pursuit of public goods is something people opt to do (at least for discrete periods in their life) because they find it more meaningful and sometimes more enjoyable than pursuit of private goals. Without exploring these criticisms further the main point is that they all appeal to deeper psychological insights than that of *homo economicus*, and by implication suggest the need for an extension of the range of outcome indicators.

In this section we focus on two process indicators: improved social assistance and enhancement of human rights. Both are associated with progress towards greater security of agency, and can also be viewed as indicators of pro-poor improvements in the IRM. Improved social assistance can be considered as primarily a 'freedom from' initiative, though recent emphasis is on how such programmes ("with bounce") enhance 'freedom to' as well (Barrientos and Hulme, 2005; Devereux, 2006). The human rights agenda straddles a 'freedom from' and a 'freedom to' purpose. The overall conclusion from this review is that the potential political liberation and rights based citizenship opportunities for the dynamic reproduction of the society towards democratic wellbeing are under-realised and indeed sabotaged by aspects of 'process as normal', in particular a continuation of widespread forms of clientelism in the distribution of food aid and infrastructure projects. Thus the wellbeing regime in Peru has been reproducing a contradiction of extending social protection and safety nets through a Faustian Bargain (Wood, 2003) with the poor, thus helping us to explain the central argument of relative political stability and path dependency despite the glaring inequalities and poverty in the society.

### **5.1 Social assistance programmes**

The main current vehicle for many of the food aid and other social programmes was until recently the National Food Assistance Programme (*Programma Nacional de Asistencia Alimentaria* or PRONAA) located in the Ministry of Women's Affairs and Social Development. Its programmes have their origins in earlier, often voluntary forms. Even before the restoration of democracy in 1980, popular kitchens (*comedores populares*) emerged in the shanty towns of Lima and other cities. After 1980, with inflation rising alongside negative economic growth, these efforts became even more significant. Competing political parties became involved and the then Mayor of Lima also began to sponsor 'glass of milk committees' (*Comites del vaso*

*de leche*) in the poorest districts of Lima. Increasingly financed and operated by the state, this programme evolved into a political instrument both of mass populism for successive presidents, and as the grist for petty clientelism (Copestake, 2006)<sup>15</sup>.

Two years after winning power, Fujimori created in 1992 the National Fund for Compensation and Social Development (*Fondo Nacional de Compensacion y Desarrollo Social* or FONCODES) as an additional instrument for channelling funds direct from central government to regions, particularly areas worst affected by the terrorist violence. FONCODES was also designed to be supported by the IMF and the World Bank as a way of dealing with the social downside of their structural adjustment prescriptions. By operating directly to the President, it emerged as a bureaucratically relatively nimble infrastructure fund targeted on poor rural communities to generate employment opportunities for cash incomes. However, being weakly connected either to other parts of government or the NGO sector, its content was weakly linked to actual needs, nor was there any independent scrutiny of contracts or hiring of labour. Thus FONCODES emerged as a useful source of clientelistic support to the post-*autogolpe* regime. Meanwhile PRONAA was switched to the Ministry of the Presidency and tasked with centralising food assistance programmes. In this way, the *comedores populares* were also captured, and the patronage of opposing political parties displaced. In effect, as a condition of access to food assistance, poor and vulnerable families lost their civilian rights, being forced instead to negotiate inclusion into these programmes - exchanging voice for loyalty. Alongside PRONAA and FONCODES other programmes in education and health also expanded in an *ad hoc* way after 1994. Public spending on social programmes (including education and health) grew steadily, particularly after 2002 when public finances began to improve as a result of economic growth and higher tax revenues. But at the same time foreign donors became increasingly sceptical of their effectiveness and critical of their clientelist manipulation.

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<sup>15</sup> By 2005 *Vaso de Leche* had grown into the biggest national food assistance programme distributing food worth \$US100 million a year to more than three million children. Municipalities were responsible for procurement and distribution through local committees, subject to strict bureaucratic guidelines from the centre. Ethnographic case studies reported by Copestake (2006) revealed serious efforts to comply with these but also widespread clientelism in local food allocation. Rations were valued by the women who obtained them but had at best a marginal effect on child poverty and malnutrition. The communitarian features of the programme had evolved to suit different rural and urban contexts, but were more paternalistic than empowering. In short, the programme was found to be reproducing a weak affective link between women and government, but one that was ultimately doing almost nothing to address the more fundamental inequalities in food and income insecurity.



The departure of Fujimori raised hopes that social assistance could be “declientelised” in such a way as to contribute to, rather than obstruct, the extension of political rights<sup>16</sup>. After his as his election as president in 2001, Toledo talked of improving democracy and reducing poverty together via social programmes which combined participatory access and professionalism in overall design and management. Indeed such a marriage was strengthened by bringing in meritocrats from civil society organisations. There was some initial increase in budgetary provision, accompanied by over-optimistic expectations of foreign aid support. A good example was the *A Trabajar* (To Work) employment scheme, to be run in the countryside by grass-roots organisations in a way intended to address problems of clientelism. However, in the context of rapidly declining popularity and concerns about the regional and municipal elections in November 2002, Toledo positioned leaders of his *Perú Posible* party to control this and other programmes, also changing the leaderships of the women's and education ministries and FONCODES. However, these moves did not rescue the reputation of *Perú Posible* in the local elections, where regional power was almost universally gained by the opposition parties, especially García's APRA. This in turn set up new political obstacles to government-inspired decentralisation of social programmes, since it would place them in the hands of opposing political networks. Thus the decentralisation of social programmes stalled. However, neither was *Perú Posible* able to assert full clientelistic control over them. Toledo's lack of popularity and legitimacy also limited his freedom to raise taxes in order to expand the programmes and thus regain support, while foreign aid support diminished with donors retreating back to the label of Peru as a relatively stable pro-Western middle-income country.

In this context, prospects for renewed donor support hinged on making headway in declientelisation of programmes, and a possible mechanism for demonstrating this was through the launch of a conditional cash transfer programme (CCT) of the kind expanding rapidly elsewhere in the region. Toledo first announced *Pro Perú* in February 2005 (later renamed *Juntos*), and it featured prominently within the National Social Policy Development Plan and the National Plan to Overcome Poverty (2004-6). However, the proposals were widely criticised for being hastily thought out, particularly with respect to targeting methods (especially in urban areas), cash handling mechanisms (especially in rural areas) and the need to improve weak health and education services before stimulating greater demand for them. As a

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<sup>16</sup> Wood and Gough (2006) describe declientelisation as a “strategy principle” for moving poor people from dependent to autonomous security. See also Wood (2007a).

result Toledo scaled back plans to a relatively small pilot programme, restricting it to one district of Ayacucho noted for being particularly severely affected by the *Sendero* conflict<sup>17</sup>.

Given donor support, it is no surprise that the *Juntos* programme has subsequently expanded under García. It is also of particular relevance to the argument here since CCTs seek explicitly to link 'freedom from' objectives (cash transfers as social protection to poor households with children) with 'freedom to' objectives (through investment in human resources that aim to help break life-course and inter-generational transfers of poverty by facilitating households' capacities to ensure children's rights to adequate nutrition, healthcare and education). Jones *et al.* (2007) reviewed the first year of the pilot programme in Ayacucho Department. Eligible, targeted households, with children under 14 years old, receive 100 soles a month (approximately US\$30) subject to meeting conditions for child care that include school attendance, vaccination, health checks, use of clean chlorinated water and anti-parasite medication for infants, and participation in other social programmes. Fulfilment of these conditions obviously has to be monitored, and along with the validation of target households this opens up opportunities for new forms of clientelism and corruption. By September 2006, 135,000 households across Peru were receiving these transfers, and the García government was planning to increase this to 250,000 families during 2007 with an incremental budget increase of US\$40 million. Actions intended to avoid clientelism and politicisation of programme implementation included placing it in a directorate within the Presidential Council of Ministers, under technocratic management monitored by civil society representatives that leapfrog other bureaucratic interests by developing a cadre of community level facilitators, predominantly women<sup>18</sup>. Monitoring is overseen by the Committee on Supervision and Transparency, comprising church and civil society leaders.

A key rationale for the CCT is to reduce the opportunity cost for poor families of keeping children at school and away from domestic, farm and perhaps casual paid labour, thereby addressing their supposed higher propensity to discount the future. Jones *et al.* (2007) report changes in children's time use in favour of schooling, with more parental support for their education, including by fathers. As predicted, increased demand for

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<sup>17</sup> The Truth and Reconciliation Commission claims that 40% of the 69,000 deaths due to political violence between 1980-2000 occurred in the Ayacucho department.

<sup>18</sup> There is a problem of illiteracy among these facilitators, who have been elected by a local assembly.

education has increased pressure to improve the quality of teachers and teaching. They report families purchasing higher quality food, and investing in longer term livelihoods security via purchase of livestock, for example. They also provide anecdotal evidence of improvements in women recipients' bargaining power within the household. At the community level, as a result of the targeting and labelling problems, there is also evidence of disharmony between those included and excluded (Wood, 2007a). Nevertheless if the programme can be scaled-up without being fatally entrapped by party or more local patronage and corruption, then it would constitute a significant positive wellbeing outcome because it confers more substantive benefits that can contribute more to security of agency. As well as making it politically more palatable to richer citizens, the conditionality becomes a deliberate attempt to lengthen recipients' time horizons, although tighter targeting risks the opposite if it creates new forms of poverty trap. The erosion of a community mediated element (when compared to Glass of Milk programme, for example) can also be empowering by strengthening a sense of individual entitlement, rather than entitlement mediated by others. No matter how well implemented, the programme alone cannot of course be expected to deliver more fearless citizenship, overcome alienation and initiate a positive dynamic of social reproduction capable of challenging the path dependency of extreme inequality. However it would certainly be a positive step in that direction.

## **5.2. Human rights**

The human rights theme is essential to any understanding of wellbeing in unsettled societies, being a crucial aspect of the personal security dimension of wellbeing, expressed both as freedom from insecurity as well as having the confidence to express voice without fear, and thus move to full citizenship and the overcoming of alienation. Peru's economically stratified ethnic diversity presents a particular challenge to a human rights agenda. Even without the obvious episodes of political violence and counter-repression by the state there is a generic, inherent, structural undermining of rights via racism and cultural othering. Given the long history of use of violence by those at the richer end of the racialised class continuum to defend privilege, the persistence of a strong human rights movement is perhaps surprising, but it can partially be seen as both a counter-reaction to such violence and part of a political settlement that must be able to address extreme human rights abuses in order to head off total chaos and collapse.

In 1985, human rights groups from across the country came together under the umbrella of *Coordinadora Nacional de Derechos Humanos* just before the elections that brought in García's first APRA government and at a time when the *Sendero Luminoso* insurgency was growing and attracting counter-repressive measures of the military. Through García's and Fujimori's periods in office, human rights activists ran the gauntlet of attacks by state security forces as well as *Sendero Luminoso*. They were increasingly labelled by Fujimori as apologists for the insurgents, while the insurgents targeted them and other left activists as a rival source of popular leadership. The *Coordinadora* and its increasingly professionalised personnel had an ambivalent stance towards the state, which perhaps became clearer towards the end of the Fujimori period as the insurgency was crushed and the military slowly returned to the barracks. But for the first ten years, it had to operate a balance between cooperating with the state to achieve individual case gains as well as more systemic ones, while also signalling an adversarial position as lobbyists and advocates. Cooperation was a hard option during a period when their own members were the target of disappearances as well as negative propaganda.

The professional persistence of *Coordinadora* paid off as early as 1993 with the inclusion of the Human Rights Ombudsman (*Defensoria del Pueblo*) in the constitution and its actual enactment in 1996. Broadly they worked with judges to strengthen their independence, including the independence of their information sources. Via social workers, they worked to improve conditions in the jails. They tracked cases of disappeared and those being held without trial, placing pressure upon the authorities to improve their conditions and reduce torture. Eventually they secured legislation to ban torture and disappearances, making them criminal offences. These efforts (and the legitimacy gained for them) culminated in the creation of the Truth and Reconciliation Commission (*Comision de la Verdad y Reconciliacion* or CVR) during Paniagua transitional government in 2001. In effect much of the work of the *Coordinadora*, along with many staff, transferred to the CVR. The incoming Toledo government agreed to abide by the Commission's recommendations and findings, arising from its nine volume report in 2004, which estimated that 69,000 Peruvians were killed or disappeared.

Before reflecting upon the enduring significance of the Commission, it must be emphasised that *Coordinadora* was not just a safe Lima institution. Dispersed across numerous small organisations across the country its activists were highly exposed to local violence of liquidation squads as well as state repression through local military exercises. The pastoral offices

(*vicarias*) and local activists of the Catholic Church in these scattered rural locations also provided important support to groups and organisations of the family members of victims.

The CVR represented a concerted and sustained attempt to institutionalise the human rights agenda within Peru. It ensured that political insecurity and the violence of the state as well as terrorists were firmly placed in the public domain. By adopting the South African post-apartheid model of public hearings around the country (unlike in other Latin American countries such as Chile), past victims and victimised groups were able to tell their story to the wider society, with strong media coverage. As a result no literate person could claim ignorance of what happened, and thus some sense of responsibility across the racialised class continuum has been established. That is important for any movement towards greater political settlement in rights as well as related social policy. Whatever its impact on future governance a further indication of this embeddedness is the willingness to pursue at least some symbolic prosecutions as a condition of reconciliation rather than to declare a full amnesty. At the same time, powerful voices in the political, military and economic elite have resisted the Commission's recommendations since 2003, and supported by negative media coverage they have managed to use Congress to block facilitating legislation. Nor has there been a formal peace accord with insurgents, past or present. Pockets of political violence continue, alongside drug related and criminal activities. For many, the terrorist threat remains and can be deployed to suppress a further liberalising of rights. And although there has been some cleaning up of the judiciary (e.g. the removal of unqualified acting judges appointed during the Fujimori period), the judiciary has been slow in human rights cases. Judicial reforms include human rights training for judges, and there has been some progress of victim reparation in areas most affected in the past by political violence<sup>19</sup>. The civil society element has also been strengthened by the Commission's presence with the victims' relatives becoming more vociferous. In addition to this, a network of human rights organisations, NGOs and church groups (originally part of the *Coordinadora*) has created another umbrella coalition - *Para Que No Se Repita* (So that we do not repeat the past) to keep the Commission's recommendations alive in the public consciousness and conscience.

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<sup>19</sup> For example, the regional government of Huancavelica has adopted Commission recommendations allocating reparations from its hard-pressed budget, and at least some other regions (Apurimac, Huanuco and San Martin) are following suit.

## 6. REPRODUCTION CONSEQUENCES

Analysis of socio-political reproduction is the critical test of regime identification and hence the wellbeing regime model. It is difficult to argue for any society that it is entirely path-dependent, with 'simple' reproduction of existing inequalities, stratification and power configurations. Some change is almost inevitable, but the question is whether or not such change is path-breaking (amounting to what Figueroa describes as a "refoundational shock") in respect of the way politics is managed. By contrasting politically settled with unsettled societies for welfare policy and regime purposes, the term 'unsettled' implies contradiction, conflict and a necessary dialectic for change. However, if power structures are sufficiently entrenched, some societies can remain unsettled over long periods in the sense of fractures, horizontal inequalities and thus absence of consensus over the overall wellbeing outcome. In Latin America perhaps more than elsewhere, the concept of a regime must also accommodate some cyclical political economy tendencies: with scope for endless variation in the way commodity booms and busts, inward and outward economic policy orientation, democratic liberalism and authoritarian populism interact with each other and more random events.

One aspect of particular interest to political scientists in this respect is Peru's failure, compared to Ecuador and Bolivia, to produce an indigenous political force strong enough to seize power: Humala's strong challenge for the 2006 presidency being at the same time indicative of the depth of disaffection with prevailing liberal-democratic institutions and of limited recourse to indigenous identity (rather than nationalistic and cultural populism) as a political strategy. Yashar (2005) argues that state corporatism under Velasco up to 1975, quickly followed by the *Sendero* conflict, undermined trans-community indigenous networks. Not incompatible with this is García's (2005) emphasis on a regional perspective on struggle over the ambiguous notion of *indigenous citizenship* fragmented across community and state. This enables her to identify and reaffirm the strength of indigenous politics but at a more local level: in the formation of *rondas campesinas* (community militia) to fight terrorists, the defence of natural resources rights and parental resistance to bilingual education, for example. She argues that indigenous activism has sought to escape the confines of the indigenous label (traditional, rural etc) by influencing instead the indigenous element in *mestizo* identity: "lack of *recognized* ethnic mobilization in the country is due to the fact that indigenous *mestizo* activism is not usually considered ethnic activism." (p.9). Noting Charles

Tilly's definition of a social movement as a cluster of contested political performances, she argues that indigenous politics in Peru is not missing but more complicated<sup>20</sup>.

This line of argument suggests local government is an important arena for sniffing out deeper shifts in political culture and opportunities for wider collective action. There are no shortage of ambitious and socially motivated mayors in the *sierra* as Schneider and Zungia-Hamlin (2005) report, nor of more progressive NGOs willing to link up with them (DFID's *EI Gol* programme being just one example)<sup>21</sup>. There has certainly been an expansion in the use of the discourse of rights and correlative duties, implying some tendency towards a greater sense of civic security of agency. García's rapid commitment to further decentralisation of health and education budgets also suggests scope for further changes in the political and financial relationship between municipalities and the state, to add to those taking place in respect of social assistance programmes. If all of these processes worked to the ambitions of their advocates, then we might see an increase in participatory politics eroding racialised class differences. Donor funding can also provide leverage for decentralisation as a constructive response to pro-Chavez and anti-Western mobilisation, feeding off feelings of alienation and exclusion. External support can also perhaps be mobilised in support of more deliberative resolution of conflicts over natural resources between foreign investors and local communities. Nevertheless, rights remain fragile and clientelistic forms of patronage and control over budgetary allocations strong. Autonomous security of agency remains weak. Alienation remains. Grassroots and regional mobilisation can be seen as a long-established element of the prevailing regime rather than a challenge to it, lacking the strength and cohesion to institute a more fundamental power diffusion process. Commenting on the prospects that Fujimori might bring lasting change to Peru, Powelson (1997:265) exhorts his readers to "contemplate the immensity of history." This is a conclusion based not only on the resilience of political culture, but also on as yet very limited diversification of the economy. While Peru's unequal security regime seems remarkably resilient and intact in its defence of inequality it perhaps allows at least for some gradual improvement in average welfare. However as a wellbeing regime this suggests the persistence of a large gap between what

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<sup>20</sup> Decentralised local struggles can be as significant as national and trans-community mobilisation. It is also less easily detached from grassroots opinion in its own hinterland, and thus co-opted into the populist projects of others or of neo-liberal pluralism.

<sup>21</sup> See Schneider and Zuniga-Hamlin (2005), but also Salgado (2006) for a cautionary examination of decentralisation efforts.

poorer Peruvians are tempted to aspire to materially and what they can realistically achieve.

## 7. CONCLUSIONS

The two main purposes of this paper were first to provide an overview of the institutional landscape within which poor people in Peru pursue wellbeing, and second to use Peru as a case study through which to reflect on the four components of a general wellbeing regime model. With respect to the first, a single overall conclusion is inappropriate to the extent that the 'devil is in the detail'. However a recurring theme has been extent to which the state is implicated in reproducing rather than mitigating the fundamental problem of a highly fragmented and unequal society. In addition, in contrast to Figueroa's theoretical determinism (admitting the possibility of transformation only through an exogenous refoundational shock) the analysis remained open to possibilities of endogenous, incremental acquisition of more equal rights and freedoms. However in so doing we have not relapsed into wishful thinking that the state can somehow reinvent itself as a more proactive and hegemonic force for change. Rather we have emphasised an evolutionary pathway of more gradualist power diffusion across the racialised class continuum in response to grassroots threats to the neo-liberal core of the economy. Part of the difficulty with this argument is that any attempt to isolate a long-term trend is confounded by short-term cycles and fluctuations in politics (e.g. between autocratic and consensual) and policy (e.g. between outward and inward orientation). These oscillations alone justify referring to Peru as an "unsettled regime" not only in the sense of changing over time, but also in the sense of a regime that survives through crisis and the performance of a relatively small political elite rather than being rooted in a deeper settlement between consolidated interests and institutions.

Turning to our second purpose, this paper deliberately adopted a more open and complex welfare regime model than that in Wood, Gough and others' earlier work. At issue is whether the additional generality (and loss of parsimony) entailed in the conceptual enlargement from welfare to wellbeing is justified in terms of the extra understanding of Peru case that it permitted. The most important argument advanced in favour is that it brings the question of poor peoples' alienation and agency more to the centre of analysis, and with it forces a closer analysis of processes and relationships as well as resources and welfare indicators.



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