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Development and Wellbeing in Peru: Comparing Global and Local Views

James Copestake

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Summary

The paper presents and reflects on multidisciplinary research into the relationship between global designs of development and the stated priorities of poor people living in Central Peru. Global designs are first presented through an analysis of four shared mental models of Peru as a welfare regime. A eudaimonic model of subjective wellbeing is then presented, based on data collected from inhabitants of seven rural and urban sites. Congruence and disjuncture between this and the global models are then systematically explored. The paper concludes that such analysis can contribute to analysis of social change and public policy that is sensitive to the cultural and political biases identified by Walter Mignolo.

Key words: Development, global, local, mental models, subjective wellbeing, welfare regimes, Peru.

1. Introduction

This paper explores different conceptions of development among both policy makers and relatively poor inhabitants of Central Peru. Its starting point is to use the concept of wellbeing as a discursive space within which to explore the ontological assumptions underpinning different visions of development. Wellbeing is taken to refer to what people think and feel internally about their life as well as what they have and do (Veenhoven 1994). The main argument is that empirically grounded research into development ontology aids analysis of both social change and public policy.

The significance of often conflicting local and global discourses of development is a recurring theme of literature on development, Long (1992) and Mignolo (2000) being contrasting examples. It is also a feature of more recent research into disjuncture between stakeholders in the delivery of aid (e.g. Lewis and Mosse, 2006; Bebbington, 2007). Conversely, Chambers (2005) emphasises the importance of congruent values for effective development intervention, an argument that resonates with many others, including liberation social psychologists in Latin America, for example (Burton and Kagan, 2005). The main contribution of this paper is to explore how concepts and methods used in positive psychology can contribute to empirical research into diverse ways of conceptualising development, including those of poor people.

It is perhaps surprising how little quantitative research has been done on relatively poor people's own conception of development and wellbeing.[2] One reason for this is that their views are liable to be conditioned by – and to change with – their material circumstance: a phenomenon referred to by various terms including response shift, adaptive or endogenous preference formation and false consciousness (e.g. Schwartz & Spranger 1999; Sen 2002; Engels, 1893). Hence researching individual views of poor people can be regarded as a distraction from addressing the more important material dimensions of poverty.[3] However, to research what they think does neither require uncritically accepting what they say, abandoning the quest for universal visions, nor making prior assumptions about how their views contribute to their own condition (c.f. Lewis, 1998). And at the very least, such information is likely to aid understanding of how poor people react to opportunities and obstacles to change.

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[2] Exceptions include Clark (2002) and Lever (2004); see Gough and McGregor (2007) for a wider review. In Peru, DFID/World Bank (2003) focused on poor people's perceptions of poverty using focus group discussions. Graham and Pettinato (2002) compare subjective wellbeing assessment in relation to economic status. Herrera (2006) investigates subjective perception of poverty among those above and below the official poverty line.

[3] An additional line of criticism of opinion data is that it biased either by impulse or opportunism and hence how questioning is framed. But it is a dangerously extreme position to deny the possibility that poor people can convey to researchers any useful information at all about their own wellbeing (Collard 2006).

This paper is based on research into relatively poor people's self-perception of their wellbeing carried out in Peru by members of the Wellbeing in Developing Countries (WeD) Research Group, as presented more fully in Copestake (2008c). As a cauldron of strong indigenous and external interests and cultures, Peru provided a particularly interesting arena for this enquiry (Degregori, 2000). At the time of the research its economy had performed reasonably well for over fifteen years during which it also experienced two democratic changes in government. But it remained one of the most unequal countries in the world, with an HDI ranking of 82 that was 12 positions higher than its GDP per person ranking (Altamirano *et al.*, 2004). Opinion polls also suggested that many Peruvians were in general less happy with many aspects of their lives than people elsewhere in Latin America, evidence supported by high rates of migration abroad (Graham and Pettinato, 2002; Schuldt, 2004).

One strand of the research was to review recent literature on development policy discourse at the national level. Section 2 analyses this material as a typology of four 'global designs' (Mignolo, 2000) or universal models for interpreting change and guiding public policy. Section 3 juxtaposes these with a model of subjective wellbeing based on data collected from inhabitants of seven poor settlements in Central Peru. It also uses the model briefly to analyse their agency through migration. Section 4 systematically compares the local model with the global model and assesses its analytical relevance. The final section reflects further on the analysis by linking it to Mignolo's (2000) vision of 'border thinking' as an antidote to the coloniality of power.

2. Global models of development in Peru

Contested views of development in Peru (as elsewhere) can be viewed as value-laden mental models of the country as a wellbeing regime.[4] A shared mental model of

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[4] The term shared mental model adds a sociological component to the idea of a mental model as a cognitive construct - shared mental models being the foundation for the norms and rules governing human interaction as institutionalised patterns of activity (Denzau and North, 1994). The term is similar to but broader than the concepts of a paradigm, collective mindset or epistemic community (Kuhn, 1970; Goldsworthy 1988; Haas, 1992). At the same time it suggests a way of thinking that is more precise than the loose amalgam of conscious and subconscious meanings, metaphors, images, stories and beliefs that constitute a discourse. Similar typologies of development thinking include Hunt (1989), Raczynski (1998) and Pieterse (2001), while the three dimensions of such thinking parallel somewhat the distinction

development is further defined here as a discourse that seeks to establish a coherent view of wellbeing in three dimensions: a normative dimension, embodying a view of wellbeing as it *should be*; a historical dimension, embodying a view of how and why wellbeing *is* as it is; and a practical dimension, concerned with how wellbeing *could be* improved. Wellbeing can in turn be defined as '…a state of being with others where human needs are met, where one can act meaningfully to pursue ones goals, and where one enjoys a satisfactory quality of life' (WeD, 2007). This is deliberately broad so as to offer discursive space for comparison of narrower interpretations of its meaning. A more detailed way of thinking about the historical dimension of wellbeing is provided by the idea of national welfare regimes (Wood and Gough, 2006). Their framework highlights the existence of a feedback loop whereby wellbeing outcomes (e.g. income growth, poverty, insecurity, positive and negative freedoms) have reproduction consequences (e.g. social stratification, popular movements, elite mobilisations). These in turn either stabilise or transform the prevailing institutional responsibility matrix (IRM), comprising a locally path-dependent mix of state, market, civil society and household institutions. The IRM in turn determines wellbeing outcomes, thereby completing the loop (Copestake and Wood, 2008:187).

Table 1 presents four shared mental models of development grounded in an inductive review of secondary literature on development policy in Peru. Each model and the overall typology is the product of an unavoidably subjective exercise in bounded rationality. However, the internal coherence of each model across the three dimensions of wellbeing cited above is important check on internal validity, since its absence would expose it to potentially devastating criticism: a model lacking in a coherent normative dimension would be open to the charge of being opportunistic; one lacking a historical dimension would be seen as unrealistic, and one lacking a practical dimension irrelevant.

The <u>income first</u> model emphasises the importance of raising average output and income. After Fujimori's accession to the Peruvian Presidency in 1991 these policies were generally neo-liberal: emphasising the importance of market deregulation, public

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between development as 'hope, critical understanding and politics/administration' suggested by Lewis and Mosse (2006:5).

sector reform and external trade liberalisation (Kuczynski & Williamson, 2003; Crabtree, 2006). A globally influential Peruvian contributor to this model was the economist Hernando de Soto, who advocates expanding the sphere of private enterprise through consolidation of property rights, thereby unlocking the 'dead capital' of informal business operators (de Soto, 2001).

Table 1: Four shared mental models of development in Peru

	Income first	Needs first	Rights first	Local first
Normative dimension	Individual material income, leisure and choices.	Poverty reduction; satisfaction of multiple basic needs.	Social justice; equity of esteem and opportunity.	Community solidarity: local self-determination.
Historical dimension	Capitalism as an engine for economic growth delivered mostly through private enterprise.	Managed capitalism: public service response to deprivations arising from or ignored by capitalism.	Constrained capitalism: popular struggle for affirmation of universal values and norms.	Beyond capitalism: resistance of local groups to the hegemonic tendencies of globalisation.
Practical dimension	Create better conditions for pursuit of private material self-interest (market led).	Build capacity to enable everyone to meet a basic set of human needs (state led).	Establish basic rights in law and fight to ensure correlative duties are delivered (society led).	Build grassroots communities in harmony with local ecology. (community-led).

Source: Adapted from Copestake (2008a:6).

The <u>needs first</u> model emphasises a more direct approach to tackling multiple dimensions of poverty defined as need deprivation or capability failure (Gasper, 2007:52-59; Gough & McGregor, 2007:11-16). It has historically been particularly concerned with the role of the state within the IRM in guaranteeing entitlement to services with public good characteristics including health, education, shelter, social protection and food security. In Peru – as elsewhere – it was promoted by the United Nations Development Programme (e.g. UNDP, 2002). The Peruvian government was less susceptible to donor pressure to align with the 'Millennium Development Goals' associated with this model than highly indebted low income countries. But the discourse was nevertheless influential, being reflected in criticism of the low proportion of government spending allocated to poverty and child welfare (e.g. Parodi, 2000; Vasquez *et al.*, 2002) and to the inefficiency of the social programmes that did exist (e.g. Tanaka, 2001).

The <u>rights first</u> model emphasises relational as well as material components of wellbeing, particularly the struggle against injustice and the potential for human rights discourse to mobilize poor and marginalised citizens. This acknowledges the importance of personal agency and social relationships to wellbeing and to its eudemonic aspect: freedom from domination by others and freedom to live a life that is meaningful in the sense of being consistent with personal goals and values. It allows for the influence of differences in cultural context and highlights the likelihood of political conflict over wellbeing.

In Peru, the model was particularly influential among NGOs (Wilson and Eyben, 2005; Youngers, 2006; Copestake and Wood, 2008). It gathered some momentum through resistance to Shining Path and to Fujimori's authoritarianism, particularly the work of the Truth and Reconciliation Commission. It can also be linked to the wider regional renaissance of identity politics (Yashar, 2005). A supporting historical analysis of how persistent inequality can be attributed to the difficulty of constructing a governing coalition committed to universal human rights is provided by Figueroa (2001, 2003). Achievement of rights, he argues, is a precondition for more equality of opportunity in markets and hence more egalitarian economic growth (Copestake, 2007). A stable feedback loop exists between racialised inequality of welfare outcomes, and culturally embedded clientelism within the IRM that can only be broken through a 'refoundational shock' to offset conditioning factors rooted in colonial subjugation.

Advocates of a <u>local first</u> model affirm the importance of diverse local, vernacular and religious views of wellbeing. They regard the other three models as bound up with predominantly Western professional and bureaucratic interests that challenge cultural autonomy and diversity (Rahnema and Bawtree, 1997; Escobar, 1995). This links with emphasis on the importance of the subjective aspect of wellbeing, including not only positive and negative emotions but also long-term life satisfaction relative to locally framed aspirations (e.g. Kahnemann *et al*., 1999; Ryan and Deci, 2001; Appadurai, 2004). Evidence from subaltern studies indicates that achievement of human rights, income and basic needs can nevertheless coexist with apathy, alcoholism, depression and high rates of suicide.

In Peru, this model can be linked to the anthropological debate over the distinctiveness of *Lo Andino* or Andean culture (e.g. Degregori, 2000; Apfell-Marglin, 2003; Masías, 2002; De Vries and Nuijten, 2002). This explores the resilience of a social identity of cultural otherness rooted in the uniqueness of the Andean environment and history. An associated anthropological literature explores how cultural disjuncture (*desencuentros*) arising from a neglect of this can undermine the goals of development agencies working in the Andes (e.g. Bebbington *et al.*, 2007; Coxshall, 2005; García, 2005; Poole, 2004; Radcliffe and Laurie, 2006; Vincent, 2004). At the same time, Starn (1991) and other scholars warn against essentializing peasant experience, or what Pieterse (2001:111) describes as the reification of indigenous and local culture.

3. Development as life goal achievement

3.1. Methodology

Drawing heavily on Yamamoto *et al.* (2008), this section presents findings from an empirical investigation into how a sample of relatively poor Peruvians perceived their wellbeing. The main objective of the research was to develop a methodology that would permit quantitative comparison of individual perceptions of their wellbeing in a way that would minimise the imposition on them of prior assumptions about the nature of wellbeing.[5] A multi-stage strategy was adopted that included an initial phase of exploratory qualitative research with a second phase of interviewing using closed questionnaires. Additional data collection activities, not discussed here, are presented in Copestake (2008c:21).

Data collection was carried out in seven sites: a large shanty town on the outskirts of Lima, a poor neighbourhood of the Andean city of Huancayo, two small towns that served as district centres (one in the Mantaro Valley and one in Huancavelica) and three rural hamlets (two in Huancavelica and one in cloud forest in Eastern Junín). These were selected purposively to capture as much variation as possible in the living conditions of relatively poor inhabitants along a rough transect stretching east from Lima. The data was collected by a team of six graduate anthropologists (four men and

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[5] Other approaches to measurement of stated wellbeing considered included the WHOQoL (Skevington, 2008), self-determination theory (Ryan & Deci 2001), satisfaction with life and domains of life scales (Diener *et al.* 1985; Veenhoven 2000; Cummins 2000). The main reason for rejecting them was that they had mostly been developed with relatively affluent and educated respondents.

two women, including two native Quechua speakers) who spent much of their time living in the research sites. Their first task was to collect data from which a profile of each community could be constructed. At they same time they met community leaders and established themselves as temporary inhabitants. Alvarez *et al.* (2008) draw on this data to provide a detailed profile of each of the seven sites. Their relative poverty was confirmed by a three-round household survey that found two-thirds of a sample of 247 households to be below the national extreme poverty line (Copestake *et al.*, 2008).

Table 2: Checklist for semi-structured interviews

1. Goals: Let's suppose that a person would like to move to live here. What things do they need to be happy? What things are necessary to be happy?
2. Resources: How do they get those things? (Ask for each goal mentioned by the respondent).
3. Emotions (individual level): How do you feel in relation to…? (Ask this for each goal mentioned by the respondent).
4. Emotions (collective): How do people of this community feel about….? (Ask this for each goal mentioned by the respondent).
5. Values: Who are the people do you most admire in this community? (Alternative question for non-formal comprehension: Who are the best persons of this community? What are the things that you admire in this person (Ask for each person mentioned).
6. Social networks: Where do you find support when needed?
7. Happiest life episodes: What were the happiest moments of your life?
8. Unhappiest life episodes: What were the unhappiest moments of your life?

Source: Alvarez (2008:157)

In the next phase the research team conducted 419 semi-structured interviews with a quota sample of men and women in each site. These were designed to elicit broad perceptions of respondents' quality of life, and were structured using the eight questions listed in Table 2, each question having first been tested for comprehensibility and equivalence in Spanish and Quechua. The researchers systematically recorded key words used in response to each, and this data was subjected to content analysis to inform design of the questionnaire used in the quantitative phase of research. At this point some imposition of theory was unavoidable. A key decision here was to take a eudemonic view of wellbeing, defined as the outcome of any gap between (a) goals, defined as those items respondents collectively identified as most necessary to live well, and (b) goal achievement, defined as satisfaction with attainment of these goals. Additional questions were framed to elicit information on resources with instrumental

importance in achievement of the same goals, and on prevailing values.[6] The resulting questionnaire, referred to as the WeDQoL, was then used to interview 550 individuals in the same research sites.

The next step was to use factor analysis to reduce responses about the many different goals to a smaller number of latent variables underlying them. A similar process was used to identify principal components underlying resources, values and personality questions. In contrast, satisfaction with goal achievement was not subjected to separate factor analysis. Instead, the preferred factor solution for goal importance was applied to the goal satisfaction data also. This was possible because the goal and satisfaction questions were based on the same list of items, the only difference being whether respondents were asked how important each goal was or how satisfied they were with its achievement. In effect this meant that goal satisfaction scores for each respondent were based on uniform weights that reflected a shared 'local' view of the relative importance of different goals derived from the responses of the whole sample.

In addition to standard statistical measures of goodness of fit, two additional criteria influenced selection of factor solutions for each scale or set of questions. First, alternative solutions were presented to the field team who discussed those that made most sense in relation to the qualitative data collected and their first-hand knowledge of the communities being studied. Second, solutions were selected to enhance the overall statistical properties of a structural equation model linking all the variables. In other words, an iterative process of qualitative and quantitative research was used to identify an *emic* factor structure for each wellbeing component at the same time as integrating all the pieces into a single model.

3.2. Components of subjective wellbeing

This section briefly reviews results from the WeDQoL survey. Starting with goal importance, mean responses across the sample for the 35 highest ranked items are shown in Table 3. This also reveals the preferred three factor solution. Place to live

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[6] The Peru team also incorporated a fifth personality scale into the instrument, previously developed for use in a poor suburb of Lima. Pilot testing of the instrument resulted in various modifications, including a decision to reduce the number of responses options. The resulting instrument was also adapted for use in the three other countries covered by the WeD research (Copestake and Camfield, 2009).

better (PLB) was linked to three items: nice and clean neighborhood, tranquility (without violence or delinquency), and *salir adelante* (able to move ahead in the sense of resolving local problems). Raise a family (RAF) was linked to two goals (partner/ marriage and children), and improvement with a secure base (ISB) was linked to having a salaried job, household goods, children's education, daily food and health, and better education.[7]

Table 3 also shows satisfaction with respect to achievement of individual items and the three latent goals, and the last column shows the difference in ranking of items by importance and achievement satisfaction. It is not surprising that respondents were generally more satisfied with those items that they also regarded as more important. This can be explained by the allocation of more effort to important goals and/or to adaptive ranking of goals to reflect the feasibility of achieving them. Interestingly, the difference in ranking column reveals three items for which satisfaction remained relatively low compared to necessity ranking: education of children, working for a salary and being a professional. All three can be linked to the critical challenge relatively poor Peruvians face in overcoming racially and culturally entrenched barriers to upward mobility.

The third scale in the WeDQoL (after goal importance and goal satisfaction) covered resources identified by the qualitative research as important as means to achievement of other goals rather than as ends themselves. Seven items loaded onto the preferred single factor solution: to get loans, to rent/lease land, saving, migration, inheritance, useful social contacts (in terms of getting work, things, services), and *gestiones* (ability to secure support from organizations to help in such things as gaining access to electricity or water supply).

The fourth scale sought to measure respondents' general values. To encourage them to be more open and realistic, they were asked about the prevailing values of people in their locality, as well as their own values. Following this methodology a robust two

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[7] The names of these and other factors were agreed after consultation with the field team responsible for primary data collection with a view to establishing reasonable congruence with their first-hand experience in the research sites.

factor solution was obtained. These factors were labelled collectivism and individualism. Although significantly and negatively correlated they do not represent poles at opposite ends of the same continuum, as it was possible to score highly on individualism and collectivism at the same time. Collectivism had three indicators: to offer support and advice, to share, and to progress through participation in neighbourhood activities. Compliance with these values was neither seen as purely altruistic nor solely as a means to other ends; rather reciprocity was implicit and open-ended. Individualism had two indicators: envy and selfishness.

Fifth, personality refers to enduring traits that characterise how individuals behave, and is also likely to influences self-assessment of personal wellbeing. Lack of resources prevented extension of the WeD qualitative work to include development of an *emic* or native scale, so an adaptation of the Goldberg personality scale for urban-marginal contexts of Peru was used instead. To explore alternative personality structures, factor analysis was used in the same way as for the other scales discussed above.[8] This led to selection of a three factor model, the factors being labelled *Mosca*, *Buena onda,* and Sociable-Warm. *Mosca* – literally a fly – is a colloquial Peruvian word for someone having a quick, sharp mind. Four items loaded onto this factor: self-confidence, perceptiveness, pragmatism and being analytical. This reflects awareness of the environment, quick reactions and survival skills, rather than abstract intelligence, and it is interpreted as being morally neutral. *Buena onda* refers to having a resilient positive attitude towards life: general good mood, enthusiasm, optimistic, not dull in perception, having a sense of humour, and absence of neurosis. The term is a high form of praise – more so in many situations even than intelligence and moral virtue. Four items loaded onto it: flexible, well organized, *desprendido* (not-materialistic) and generous. *Buena onda* is more than an agreeable person; it assumes generosity and the absence of selfishness. It also refers to someone who is intentionally agreeable rather than charming in an unstructured way. Flexibility could be seen as an important component of good relations in a multicultural context. Sociable-Warm is derived from three items: warm, sociable/shy and sociable/reserved. It correlated with *Buena onda*, but the latter

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[8] Confirmatory factor analysis did not support adoption of the widely used five-factor personality model of Costa and McRae, confirming that its applicability to non-Western cultural contexts is not established (Triandis & Suh 2002; Yamamoto *et al.,*2008).

refers more to the intensity of interpersonal relations than their quality; a person who is *Buena onda* can still be more open or closed.

Table 3: Relative goal importance and satisfaction with their achievement

Latent goals and their component items	Importance		Satisfaction		
	mean[a]	rank	mean[b]	Rank	dr[c]
A place to live better	1.53		2.16		
• Clean and nice environment (0.79)[d]	1.47	14	1.9	23	-9
• Tranquility: without violence or delinquency (0.64)	1.54	9	2.21	16	-7
• Getting ahead / resolving problems (0.48)	1.56	8	2.35	8	0
Raise a family	1.07		2.08		
• Marriage (0.79)[e]	1.06	26	1.83	25	1
• Partner (0.79)	1.03	28	1.97	21	7
• Children (0.77)	1.09	25	2.23	15	10
Improvement from a secure base	1.68		1.99		
• Work for a salary (0.55)	1.59	6	1.28	28	-22
• Room or house (0.53)[e]	1.68	4	2.33	10	-6
• Consumer goods like television or liquidizer (0.53)	1.17	24	2.19	18	6
• Education for children (0.50)	1.77	3	1.91	22	-19
• Daily food (0.50)[d]	1.85	2	2.53	2	0
• Health (0.50)	1.88	1	2.53	3	-2
• To be a professional (0.38)	1.51	12	0.18	34	-22
Other individual items					
• Electricity, water, sanitation	1.63	5	2.32	11	-6
• Good family relations	1.57	7	2.65	1	6
• To be good with God and/or the church	1.53	10	2.28	13	-3
• To be of good character	1.52	11	2.5	4	7
• Education for yourself	1.51	13	2.26	14	-1
• Public transport	1.44	15	2.21	17	-2
• Improvement in the community	1.41	16	1.86	24	-8
• Household goods (e.g. pots & furniture)	1.38	17	2.34	9	8
• Getting on well with neighbours	1.37	18	2.46	5	13
• Recreational space, like sports complex	1.37	19	1.97	20	-1
• To teach others what you know	1.36	20	2.42	7	13
• Neighbours participate in an organised way	1.28	21	2.13	19	2
• Clothes	1.26	22	2.3	12	10
• Friendship	1.18	23	2.45	6	17
• Telephone or other form of communication	1.06	27	0.9	31	-4
• Shop, buying and selling (cattle, crops)	0.97	29	1.18	29	0
• Member of communal/community assocn.	0.95	30	1.61	27	3
• Own transportation	0.92	31	1.1	30	1
• To be in a position of authority	0.7	32	0.82	32	0
• Go to fiestas	0.42	33	1.76	26	7
• Participate in organising fiestas	0.29	34	0.71	33	1

Source: Adapted from Yamamoto (2008:68) and Copestake (2008a:213).

Notes: a. Item importance was rated by respondents on a three point scale (very necessary = 2, necessary = 1, not necessary = 0). b. Goal satisfaction was rated on a four point response scale (satisfied = 3, so-so = 2, not satisfied = 1, don't have = 0). c. dr refers to the necessity ranking less the satisfaction ranking. d. Figures in brackets are factor loadings for a confirmatory factor analysis with three factors. Other statistical parameters of the model are as follows: CMIN=40.765; DF=32; P=0.138; CFI=0.990; RMSEA=0.023; RMR=0.008; AGFI=0.972; PGFI=0.572; NFI=0.956. e. These items were combined in the model with the one immediately following.

3.3. Modelling satisfaction with life goal achievement

So far this section has described how the WeD Peru team empirically identified three shared latent goals, as well as a set of factors thought likely to influence satisfaction with their achievement. The next step was to estimate relationships between these variables using structural equation modelling. Yamamoto *et al.* (2008) and Yamamoto & Feijoo (2007) describe and interpret the results in more detail. All the regression weights and covariances in the models presented below are significant ($p< 0.05$ or better), and all models show a significant fit ($p< 0.01$ or better). The numbers shown in the figures are standardized coefficients.

Figure 1 shows an integrative model for satisfaction with the latent life goal <u>place to live better</u>. It shows that PLB achievement is directly associated with four observed variables, and indirectly with two others. Figures 2 and 3 present similar models for RAF and ISB satisfaction.[9] The ISB goal can be viewed as corresponding closely with the Western idea of development, and suggests a desire to be part of a modernization process, subject to not taking excessive risks. Satisfaction with achievement of ISB among respondents was generally low, reflecting their relative material poverty. Rather surprisingly, RAF importance was directly correlated with ISB achievement. One explanation for this is that giving more importance to raising a family lowers people's frustration with failure to achieve modernisation goals, as it puts such goals into wider perspective. Less surprisingly, a positive association existed between this variable and perceived adequacy of resources. This also acts as a link through which ISB goal importance affects ISB achievement: the more important this goal, the more resources a person is likely to command and more likely to be satisfied with their achievement of it.

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[9] Statistics for the PLB model (Figure 1) were as follows: *chi^2 (9, N=330)=13.644, p=0.136, CFI=0.983, RMSEA=0.040.* RAF (Figure 2) is also negatively associated with resources, and only when this path was introduced did the overall model become significant *[chi^2 (9, N=330)=15.196, p =0 .086, CFI=0 .977, RMSEA=0 .046].* The path model depicted in Figure 3 for ISB satisfaction also revealed a good fit: *chi^2 (11, N=330)=16.658, p=0 .118, CFI =0 .963, RMSEA=0 .040.* Yamamoto *et al.* (2008) interpret the correlations between the variables, and also provides an integrated model that combines the three models reproduced here. It also explores the significance of differences in findings by age, gender and other demographic variables, though scope for this was limited by the small sample size (Yamamoto *et al.*, 2008).

To sum up, this section has presented a way of constructing a local shared mental model of wellbeing in terms of achievement of latent life goals. This sought to minimise the influence of the prior mental models of wellbeing of the researchers. Although the model satisfies standard criteria for internal validity, its external validity is limited by the small and non-representative nature of the sample on which it is based. The analysis nevertheless provides a useful point for comparison with the shared mental models presented in Section 2. These defined development in terms of a coherent view of wellbeing with normative, historical and practical dimensions. In comparison, the empirical model presented in this section started with the normative dimension of wellbeing (latent goals), then introduced a historical dimension in the form of data on actual satisfaction of these needs as well as perceptions of additional resource constraints. Individual personality and prevailing values were also incorporated into the model as additional influences on both individual goal formation and satisfaction with their achievement. The analytical procedure relies on the strong assumption that wellbeing arises from a gap between life goals and perceived achievement of them. It also assumes a high degree of cultural homogeneity by merging individual data into a single model for the seven research sites, something that can be justified in part by the high level of mobility observed within the region in which they are located (see below).

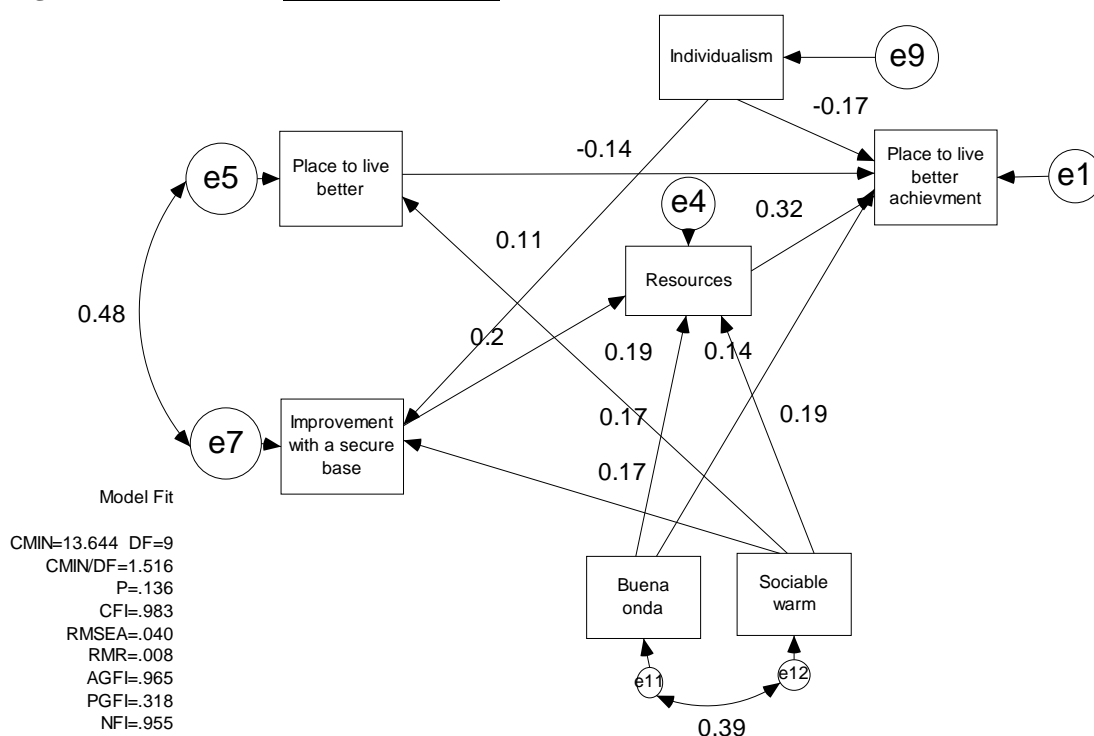**Figure 1 Path model for <u>place to live better</u>**
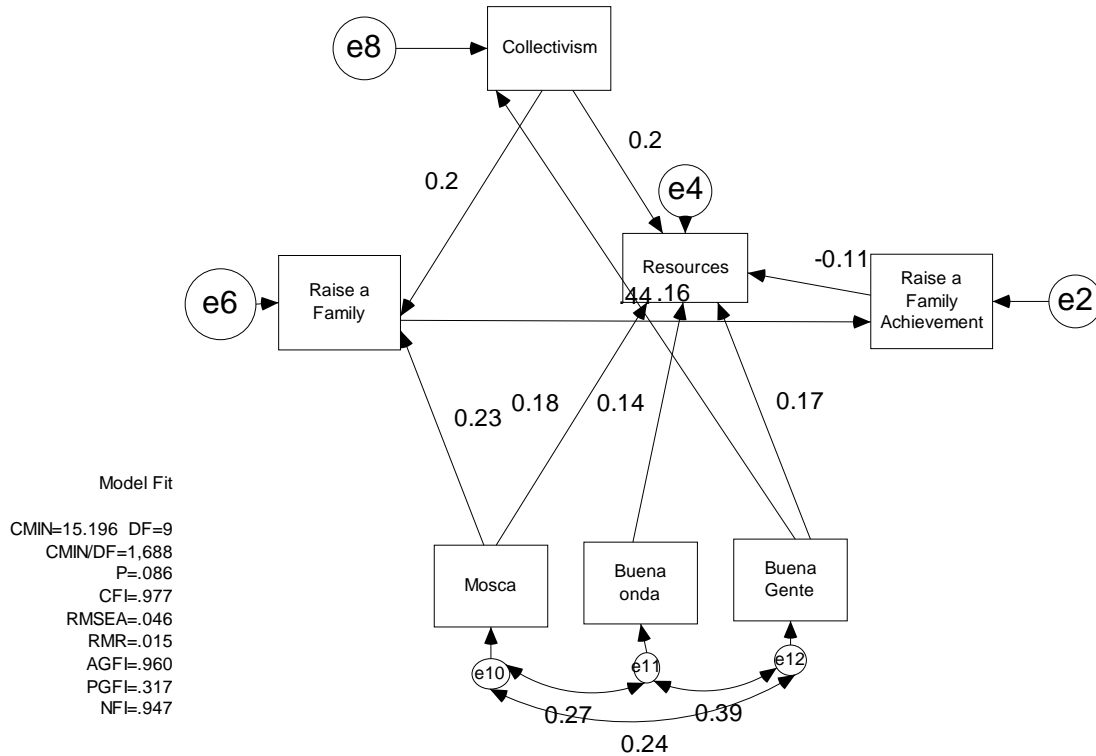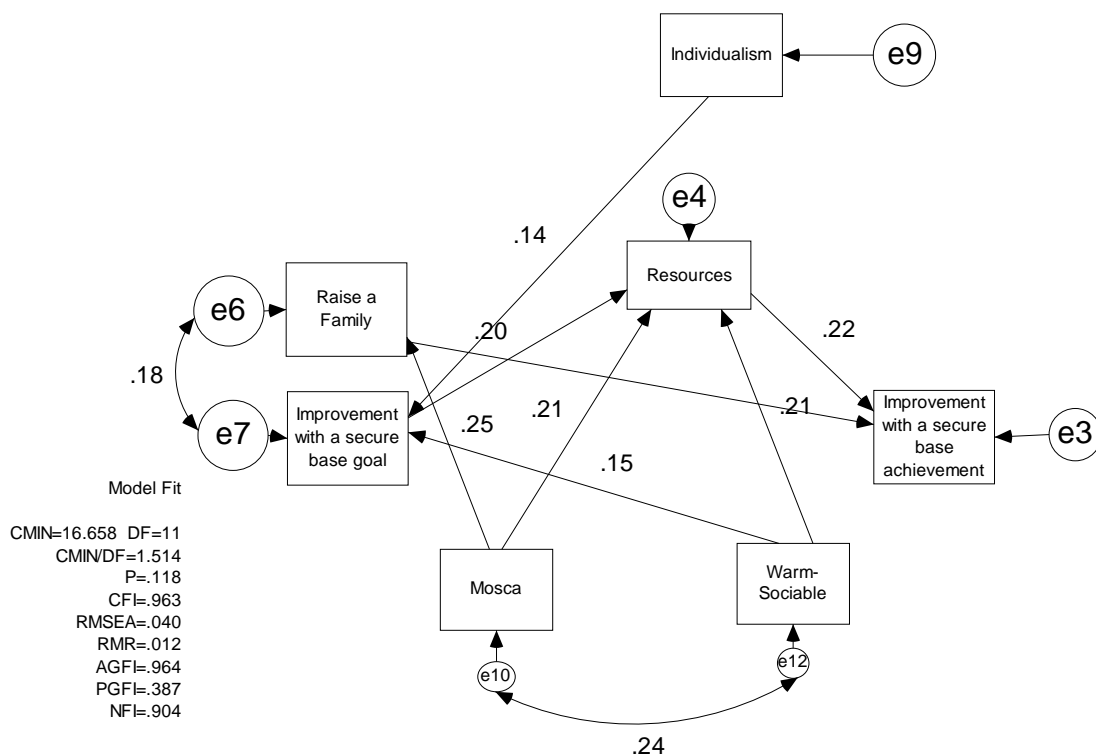
Figure 2 Path model for <u>raise a family</u>

Model Fit

CMIN=15.196 DF=9
CMIN/DF=1,688
P=.086
CFI=.977
RMSEA=.046
RMR=.015
AGFI=.960
PGFI=.317
NFI=.947

Figure 3 Path model for <u>improvement from a secure base</u>

Model Fit

CMIN=16.658 DF=11
CMIN/DF=1.514
P=.118
CFI=.963
RMSEA=.040
RMR=.012
AGFI=.964
PGFI=.387
NFI=.904

3.4. Migration and individual wellbeing

The WeD research sought to investigate the influence of additional variables on individual wellbeing, and this section illustrates with reference to the work of Yamamoto *et al.* (2008) and Lockley (2008) on migration into and out of the selected research sites. Throughout the second half of the twentieth century Peru experienced a massive exodus from rural areas to cities, and internal migration remains an important contemporary issue. In 1940, 35 percent of the population was urban and 65 percent rural; whereas by 1993 the situation had reversed, with 70 percent urban and 30 percent rural population (INEI, 1995). While nearly one third of Peruvians live in or near Lima, migration to other coastal areas, to cities in the highlands, and to the jungle has also been important. Migration from the highlands increased further as a result of the Shining Path conflict in the 1980s, with only a limited reverse flow once the violence diminished (Stepputat and Sorensen, 2001). High levels of migration have contributed to the complexity of interactions and interdependence within the Central Peru region (e.g. Altamirano, 1984; Sorensen and Stepputat, 2003), and a growing proportion of the rural population can be described as 'rural urbanites' as a result of circular migration (Paerregaard, 2003). All these trends were corroborated by data collected in the seven study sites (Lockley, 2008:124).

Insight into how migration affected wellbeing was obtained by asking respondents who completed the WeDQoL survey how long they had been living in that locality. Although the sample size was small this threw up statistically significant differences. These were then explored further through in-depth qualitative interviews. For <u>place to live better</u> there was a much larger gap between goal importance and achievement for people who had more recently moved. Conversely, those who had been resident in a place for 15 years or more were both less concerned with PLB as a latent goal and more satisfied with its achievement (Yamamoto *et. al*, 2008:71). This difference can be explained in part by the fact that respondents who had moved within the last fifteen years were more likely to be living in urban areas and to have fled from terrorism, domestic violence and family conflicts. In the two urban sites, made up entirely of immigrants, the importance of PLB was higher but satisfaction lower. In contrast, a lower gap between aspiration and achievement generally existed among longstanding rural residents. For many of them a better environment (including being able to grow

their own food, avoid pollution and feel more physically secure) provided some justification for resisting the risky material rewards of moving to the city.

In the case of <u>raise a family</u> there was some dropping off in goal importance for people who had lived longer in the same place, but no statistically significant link was established between residence period and satisfaction with achievement of this goal. However, it was lowest in the two urban sites, and both goal importance and satisfaction rose significantly with the age of respondents. Additional in-depth interviews revealed important but diverse life-cycle dimensions to the decision to migrate: many migrants moved primarily to establish an independent home and family with their partner; but others delayed starting their own family in the hope of improving their economic situation first (Lockley, 2008). These interviews also revealed a powerful link between migration and the life-cycle related process of securing greater personal independence from close relatives. Those who moved and who were left behind described the huge emotional costs associated with migration in pursuit of at best highly uncertain dreams of self-advancement, and of establishment of more equitable or interdependent relationships.

In the case of <u>improvement from a secure base</u> no clear pattern emerged from cross-analysis with residence period. This can again be attributed to the diversity of forms of migration. In-depth interviews revealed there to be a strong positive ISB motivation for migration to urban areas, particularly Lima: this being associated with terms like 'betterment', '*superación',* 'improving life conditions', 'securing the future' and 'upward social mobility' (Lockley, 2008). The same was also true for migration to rural areas in search of better access to land for cultivation. But many longstanding residents in rural and urban areas also had strong ISB goals. A clearer difference emerged in response to questions about perceived adequacy of resources to achieve these goals: recent migrants being significantly less satisfied in this respect, particularly those who had migrated long distances.

Overall, what emerges from both the quantitative and qualitative evidence is the complexity of the personal trade-offs in wellbeing that migration entailed. For many, the main cost of searching for a more secure livelihood was not so much delaying starting a family but being forced to live in a more insecure and uncertain environment.

Migration also emerged as more than a movement of individual workers driven by real wage differentials or even the outcome of diversified household livelihood strategies, but as part of a life-cycle process of seeking greater independence from relatives, particularly parents. An understanding of the relational dimensions of migration should *not* be regarded as a useful supplement to a separate understanding of more important material dimensions. Rather, material, relational and emotional effects of migration are profoundly interrelated.

4. Global and local models compared

The next step in the argument is to consider the extent to which the local wellbeing model developed in Section 3 is congruent with the four global models of development presented in Section 2. What added insights does the local model offer into relatively poor people's motivation and action?

Starting with the normative dimension of wellbeing, improvement from a secure base (ISB) can be related most strongly to the needs first model, components of both including entitlement to food, health care, shelter and education. These and the goal of obtaining a salaried job are also congruent with an income first model, subject to the issue of how effectively income confers entitlement to these various needs. Cross-tabulation of individual ISB satisfaction against income poverty classification of the respondent's household confirmed a significant positive correlation, though only for those living in urban areas (Copestake *et al.*, 2008:118). In reflecting also the aspiration for professional status the ISB goal is reasonably congruent with a Western conceptualisation of development as modernisation (Yamamoto, 2008).

Turning next to raise a family (RAF), there are grounds from an evolutionary psychology perspective for believing this to be not only a shared latent goal but a universal latent need, yet any reference to it is strikingly absent in the normative dimension of the four global models of development presented in Section 2. One explanation for this disjuncture is that the global models reflect a secular and progressive view of development that would be weakened by explicit reference to 'traditional' family goals and associated values. In contrast, raising a family does of course feature prominently with religiously inspired visions of development, including that of the Catholic Church. A second interpretation is that RAF is almost taken for

granted as a goal for many people, but one that can be subsumed under the goal of improved income, need satisfaction, rights and community identity. However, these goals cannot be assumed to be positively correlated. Malthus (1798), for example, emphasised the trade-off between them by linking the pursuit of a secure livelihood (though migration, education, apprenticeship etc) with delayed marriage. Consistent with this was evidence that individual RAF satisfaction was indeed significantly and *negatively* correlated with income poverty classification of respondents' households (Copestake *et al.*, 2008:115).

A similar inverse correlation was also obtained for the relationship between household poverty and satisfaction against the <u>place to live better</u> (PLB) goal. The most likely explanation for this is that pursuit of higher income, particularly through migration, often comes at the expense of living in a less tranquil and secure environment. Here the <u>local first</u> model – with its emphasis on the importance of community identity to achieving social harmony – is more congruent with the local model than the other three. This, plus the ISB goal, can also be taken as evidence in support for the normative 'security first' model advanced by Wood (2003).

Overall, normative differences between the global models and the local model are significant, but so are the similarities. Perhaps the most distinctively 'Peruvian' aspect of them is the low satisfaction with achievement of highly ranked status goals for education, salaried employment and professional status (all components of ISB) highlighted in Table 3. The combination of persistent aspirations to improve personal status combined with low perceived achievement can perhaps explain the comparative evidence that Peruvians report being less happy in general than other Latin Americans (Copestake *et al*., 2008:104). Guillen-Royo (2007) also convincingly links this to low relative incomes in a highly unequal society, particularly in urban areas where poor people are confronted daily with conspicuous consumption they crave but are unable to match.

Turning from the normative dimension to the means by which wellbeing can be achieved, the first variable highlighted by the local model was <u>perceived resource availability</u>. To recap, this comprised items that were useful to life goal achievement but did not constitute life goals in themselves. Material components of this factor

include access to credit and land for rent, wealth (through inheritance) and ability to save. But others -having good social networks and official contacts- are explicitly relational. This is consistent with the greater emphasis attributed in the <u>rights first</u> model, for example, to social and cultural capital alongside material and physical capital. It is also reflected in model of social inclusion developed by Figueroa that identifies racial discrimination in markets and institutional racism in politics as key determinants of persistent inequality in Peru (Figueroa *et al.*, 2001; Figueroa, 2001 and 2003; Copestake, 2007).

The other variables in the subjective wellbeing model – personality and perception of prevailing values - invite further analysis of the social processes of development. The <u>income first</u> model connects with this only in its implicit and narrow emphasis on individual freedom (or autonomy): highlighting the danger of cultural disconnects when this view of human nature is overemphasised and collective values are downplayed. The <u>local first</u> model, in contrast, is more explicit in recognising a tension between individual and collective identity. Chambers (2005), Copestake (2008a) and Yamamoto (2008) explore this line of analysis further, emphasising the importance of cultural sensitivity and reflexivity among development workers.

Perhaps even more importantly there is scope for bringing these variables more explicitly into analysis of policy. For example, Copestake (2008b) explores the way in which the *Vaso de Leche* (Glass of Milk) programme in Peru has proved an effective and durable means of political patronage in both urban and rural contexts despite delivering demonstrably limited material benefits to participants. The explanation lies in part in the way it engendered loyalty (amounting perhaps to false consciousness) by resonating with collective values and institutions. Alvarez (2008) takes such analysis further by mapping the latent life goals identified in Section 3 onto the institutional responsibility matrix (household, communal association, firms, municipality, NGOs, agents of central government and so on) in each of the seven WeD research sites. He also uses the wellbeing framework to highlight the multiple life goals that endogenous institutions including festivities and *faenas* can help to support. This provides the basis for him to criticize reductionist analysis that draw on narrower discipline-specific assumptions about wellbeing to analyse these institutions solely in economic or political terms. Of course these institutions do have economic and political functions, but his

point is that it should not be assumed from the outset that these are their only functions: the local wellbeing model provides him with a normative framework against which to explore a more holistic range of possibilities. In his defence of these local institutions he is not privileging a <u>local first</u> view by assumption but refusing to rule out the possibility that so-called traditional institutions may serve holistic and thoroughly modern purposes (see also Douglas, 2004).

This point can extended to inform further analysis of the social psychology of participation in collective action and social mobilisation that Figueroa identifies as a key constraint to a more inclusive pattern of development in Peru. The assumption of *homo economicus* that underpins <u>income first</u> thinking (including Figueroa's own pessimistic model of the reproduction of inequality) is virtually useless in this regard, since it assumes away the values, norms and motives whose presence is critical to such action.

5. Conclusion

The starting point of this paper was a practical one: what can empirical research into individual conceptions of wellbeing contribute to the analysis development? North's concept of shared mental models was invoked as a starting point because it offers an explanation for the coexistence of multiple and path-dependent views as a response to system complexity and pervasive uncertainty. Of course, mental models and ideologies also reflect partisan interests, and manipulating the language of development is also part of the power struggle between different stakeholders within any welfare regime. More fundamentally still, the ontological and epistemological foundations of their different mental models are also prone to self-serving bias. This final section explores this tension by evaluating the argument of the paper against the ideas of Walter Mignolo, as set out in *Local histories/global designs: coloniality, subaltern knowledges and border thinking* (Mignolo, 2000).

In this book, Mignolo offers nothing less than a history of the different ways people have thought about Latin America over more than five hundred years, one important aspect of this being a deconstruction of the concept of Latin America itself. Without neglecting historical events and the material facts of European colonisation, he focuses on "colonial semiosis" or the evolution of values and ideas that accompanied and

underpinned them. This entails attempting to disentangle the hybrid influence on the Americas of colonial and modern ways of thinking associated with three waves of globalisation: those associated (as a first approximation) with Iberian Christianization, British industrialisation and French/US inspired pursuit of citizens' rights over class and racial purity. Starting with Wallerstein's idea of world systems theory and Anibal Quijano's concept of the 'coloniality of power' he describes the geopolitics of knowledge as the persistent subordination of indigenous ideas and interests to the 'global designs' of modern colonialism.

Mignolo suggests that authentic 'post-Occidental' discourse goes beyond reflex opposition to modern/colonial views, not least because Europe and North America also have their local histories. It also amounts to something more creative than a *creole* refashioning of global designs to local context. It is transdisciplinary, and replaces Western separation of fact (*episteme*) from opinion (*doxa*) with contextually embedded knowledge ('gnosis') and a 'pluritopic hemeneutics'. Its main source is what he calls 'border thinking' that takes place at the interface between globalized knowledge (associated with modernity, progress, technology, reason) and local cultures (associated with tradition, folklore, passion). One of the many examples he cites is Juan Jose Mariategui's adaptation of Marxist ideas (a global design) to Peruvian context (its local histories of racialised-class hierarchy) during the 1920s (Mignolo, 2000:140).[10]

How is the analysis of global and local models presented in this article to be located in Mignolo's geopolitics of knowledge? And to what extent does it qualify as post-Occidental or border thinking of the kind he advocates? These two questions are considered in turn below. Income first, needs first and rights first can all clearly be viewed primarily as weakly localised versions of global designs, though not without significant Peruvian inputs. In contrast, the local first mental model has some similarity with border thinking, especially to the extent that it moves beyond a mere negation of the other models and supports trans-cultural exchange of ideas between different subaltern groups. While aware of the criticisms levelled at it by other Peruvian social

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[10] In contrast, and rather disconcertingly, he makes no mention of Abimail Guzman's tragic adaptation to a Peruvian context of Maoist ideology.

scientists, Mingolo is mildly supportive of the attempt of PRATEC and other groups to build a distinctive Andean ideology, for example (2000:300).

The local model of subjective wellbeing described in Section 3 of this paper is more difficult to place in his analysis. The methodology was developed principally by Peruvian academics working across the boundary between psychology and anthropology. While the conceptual components of the model (life goals, life goal satisfaction, resources, values, personality) were externally imposed on respondents, the researchers also went to considerable lengths to identify individual components of wellbeing through content analysis of respondents own words in Quechua as well as in Spanish. And while the research was funded and influenced by foreign researchers, the collaboration was at least framed by an ideology of working in a trans-disciplinary and cross-cultural way. The Peru team also developed the methodology in opposition to other approaches, including those focused more narrowly on economic welfare and hedonic wellbeing. The focus on wellbeing also served as an antidote to the self-serving emphasis on negativity and failure, as highlighted in the critique of Western development by Escobar (1995), for example.

Two other closely related assumptions of the research can be called into question: the focus on individual wellbeing (as determined by gaps between stated goals and perceived achievement) and the decision to seek quantitative measures of this. On the first point, it would be a very limited and contrarian post-Occidental epistemology that rejected all research at the individual level. And while individual responses were valued, they were also pooled and analysed and interpreted in a wider socio-cultural context. The three latent goals, for example, reflect a collective view of subjective wellbeing derived from the pooled data, but also demonstrating a statistically validated degree of cultural homogeneity among respondents despite their geographical dispersion. Indeed the methodology represents an empirical tool for testing universality of life goals empirically (Copestake and Camfield, 2009).

At the same time, the context-specificity of the wellbeing model presented here underpins the importance of complementary ethnographic research into how it relates to shared local narratives of development. There is also scope for interpretation of the data from many different philosophical and ideological perspectives. Within the research

team, for example, findings were explored in relation to evolutionary psychology, post-Polanyi sociology and institutional economics.[11] The key point is not to privilege particular individual, local, global or disciplinary mental models of development and wellbeing but to confront them against each other, and to do so in a way that is empirically grounded. Similar research across a wider array of contexts can help inform policy analysis with a better understanding of the plurality of aspirations, interests and ideas that affect development outcomes.

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[11] Promising additional lines of cross-cultural enquiry were also missed, including direct bilateral dialogue between WeD participants in Peru, Ethiopia, Thailand and Bangladesh without reliance on UK and English language mediation.

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