The elephant in the field: Exposing the obstacles to project
“success” in a western-led agroforestry initiative in the Peruvian
Amazon

by

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Abstract

Offsetting carbon emissions by financing tree-planting projects in the Amazon has become an important strategy in current efforts to foster sustainable development. This study examines how this “sustainability discourse” is implemented by both outsiders and villagers in a local agroforestry project managed by a British environmental foundation in a poor village in the Peruvian Amazon. Research was undertaken over a period of three months through archival research, participant observation and interviews with project staff, volunteers, and local farmers. This study finds that the relationship between outsiders and villagers corresponds to the process of orientalism, which makes the agroforestry project neocolonial and durable at the macro scale, yet ineffective at fostering sustainability in the village. This study also provides recommendations that planners could use to make their project more egalitarian, while keeping in mind that neocolonialism cannot be challenged without large-scale systemic changes to the global economy.

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Chapter 1 – Introduction: “Fostering sustainability” in the Peruvian Amazon

In 2008, an institution in the United Kingdom wishing to offset some of its carbon emissions partnered with “New Forest”, a British environmental foundation engaged in research and community development projects in in the Peruvian Amazon¹. Together, they developed an agroforestry² project with banana farmers in “Flora”, a poor village in Eastern Peru. The project has the dual goals of “fostering sustainability” in the village by offering farmers a viable alternative to logging and clearing forests for cultivation, while at the same time offsetting carbon emissions in Europe. According to the project planners,

...pilot projects such as this offer much more than just carbon – it promotes sustainable development and behavior change, it offers the local people the opportunity to improve their livelihoods while saving natural ecosystems and biodiversity, consequently helping to mitigate climate change (Clark, 2009, p. 4).

Indeed, the agroforestry project aims to offer more than just trees and carbon credits – it also promotes “sustainable development” and “environmental education”, and seeks to “build relationships” between local villagers and Europeans (Clark, 2009; 2010). In fact, this project is part of a “sustainability” *discourse* – a set of language-based mental constructs, social practices, as well as material realities (Gee, 2011, p. 39) – which rationalizes and justifies carbon offsetting as a viable means of mitigating climate change.

How is New Forest able to implement its sustainability discourse in the Peruvian village, if at all? The discourse may provide a rationale for the foundation’s decision to implement the agroforestry project, but at the same time, local participants are not passive recipients of western

¹ The names of the institutions, project participants, and their specific locations are not mentioned in order to maintain anonymity. Keeping the names of the British foundation and funding institution anonymous was agreed upon at the beginning of this study, and was a requirement of the Research Ethics Board. The British foundation is referred to as “New Forest”, and the Peruvian village is referred to as “Flora”. The pseudonym “Jane Clark” is used to reference information from the British foundation’s website and documents.

² Agroforestry is the combination of trees with agricultural crops (banana plants, in this case), a strategy intended to create more diverse, productive, and sustainable land-use practices (USDA, 2010). The specific details of New Forest’s agroforestry project will be explained in Chapter 4.

ideas, rationales, and practices. What happens when western³ interests collide with the interests of local people? How is the sustainability discourse negotiated locally, and how do local participants challenge or sustain the conception of sustainability that planners have in their vision for the project?

In human geography, there are two main perspectives on how environmental initiatives and their discourses operate: the macro-scale political economy perspective, and the local resistance perspective. On one hand, critical studies in political economy show that western-led environmental projects can be seen as forms of neocolonialism that reproduce traditional relations of exploitation between rich and poor countries (Backstrand & Lovbrand, 2006; Baldwin, 2009; Skutsch & Van Laake, 2008). According to Carrier and West (2009), many scholars see environmental discourses as “a new device of global governance and control” (p. 20). On the other hand, studies looking at how environmental projects are implemented in villages show that project goals are not easily achieved in practice. Indeed, scholars point out that local people actively engage with western discourses and negotiate them in ways that may produce, adapt, and/or reject them locally, calling into question whether they can truly be considered hegemonic (Filer, 2009; Geoghegan, 2009; Peters, 2000; Sundberg, 1998; 2006). Fewer studies have looked at the relationships between “outsiders” and “villagers”, and at how western interests and what may be exploitative projects coexist with local interests and strategic participation.

Currently, we still have a poor understanding of how international carbon offsetting projects are carried out in developing regions (Lovell & Liverman, 2010), and how their discourses are translated from vision into practice (Carrier & West, 2009). It is not clear what

³ In this thesis, the terms “western”, “the West”, and “westerners” refer to worldviews, places, and people in Western European and North American regions.

happens between the ambitions of mitigating climate change while making economic profits, to developing local strategies for recruiting participants and managing local projects in a way that achieves their macro-scale goals. While studies in political economy usually look at carbon offsetting from a macro perspective and tend to emphasize its exploitative nature, research looking at local responses usually focuses on their resistance to hegemonic discourses without also considering how they simultaneously persist at a larger scale (see Filer, 2009). However, as I explain in this thesis, environmental initiatives are not purely neocolonial, just as they are not always met by direct local resistance. Rather, these initiatives have uneven and contradictory features, where neocolonialism, genuine desires to create sensitive and participatory projects, local participation, and local resistance can coexist.

To capture the unevenness and complexity of carbon offsetting projects, we need to look at the material realities, mental constructs, and social practices of their environmental discourses from a holistic perspective. First, we need to look at how carbon offsetting works at both macro and micro scales. This requires understanding how projects fit into the global carbon economy and western geographical imaginations, in addition to understanding how people reproduce, adapt, and/or reject discourses (or parts of them) locally. Looking at both macro and micro perspectives in the same study can provide new insights into the dynamics of exploitation and resistance.

Second, we need to consider both “local” and “outsider” perspectives together. This involves looking at how local villagers react to western discourses, but also considering the perspectives of project staff and other outsiders hired to implement environmental initiatives. As project outcomes are likely to be co-produced by villagers and outsiders together, it is necessary

to look at how these two groups interact with each other, how they participate in projects, and how they engage and negotiate with dominant environmental discourses.

Third, we need to work with theories that are useful for understanding the complexities and contradictions in the relationships between outsiders and villagers working together on western-led environmental initiatives and in the dynamics between macro-scale projects and local responses. From the field of sociolinguistics, Paul Gee's (2011) definition of discourse – as a set of language-based mental constructs, social practices, and material realities – is useful for capturing both ideological and socioeconomic components of carbon offsetting projects. From the discipline of sociology, the theories of structuration (Giddens, 1984) and performativity (Butler, 1997; Goffman, 1959) provide ways of looking at the relationship between structure and agency, and at complexity in people's behaviours, respectively. From the field of cultural geography, the concepts of orientalism (Gregory, 2004; Said, 1979) and cultural hybridity (Canclini, 2005; Pieterse, 2009) are useful for understanding the social dynamics between outsiders and villagers while keeping in mind the socioeconomic inequalities between the two groups.

This research analyzes New Forest's sustainability discourse from a holistic perspective, which integrates macro/micro and outsider/local perspectives. Drawing on structuration theory, performativity theory, and Paul Gee's conceptualization of discourse, I develop an integrated theoretical framework to understand how discourses work at multiple levels. At the macro scale, I examine how "sustainability" fits into the carbon economy and in the West's collective imagination, and how it shapes the design and objectives of the agroforestry project. In the local village, this study looks at how both outsiders and villagers – with their different socioeconomic positions, worldviews, and interests – participate in the same environmental project in different

ways. I specifically analyze how local farmers, international volunteers, and project staff come together to work in the agroforestry project, and looks at how they reproduce, adapt, or reject New Forest's sustainability discourse⁴. I then use the concepts of orientalism and cultural hybridity as lenses through which to interpret and explain how local participants engage with the sustainability discourse, and to explain the dynamics of exploitation and resistance within carbon offsetting projects. While orientalism can be useful for understanding how outsiders draw on hegemonic discourses to assert their power/knowledge in relation to other people and places, cultural hybridity can inform on how local people adapt and resist environmental discourses, and undermine their power. Finally, I make suggestions that planners for the agroforestry project and for carbon offsetting initiatives in general could use to make their project more equitable, while keeping in mind the global inequalities that limit their possibility to change environmental projects and neocolonial discourses at a larger scale.

In doing so, this research seeks to address two limitations in critical studies looking at international environmental initiatives and their supposedly neocolonial discourses. The first limitation is theoretical. Most studies look at various facets of environmental discourses separately. Some focus on the macro scale, others on the local community perspective; some studies focus on westerners, others on local people; and some studies emphasize economic factors while others look at the cultural ones. Fewer studies have attempted to combine different perspectives in order to gain a more nuanced understanding of how environmental discourses work locally. This thesis borrows theories and concepts from linguistics, sociology, and cultural geography and integrates them to analyze how the sustainability discourse appears in the New

⁴ In this study, "New Forest's sustainability discourse" refers to the mental, social, and material components that constitute the notion that carbon offsetting and the agroforestry project are forms of sustainable development and therefore viable solutions to mitigating against climate change and reducing poverty and that are used to set projects into motion.

Forest foundation's vision and how it is implemented in the local village. The second limitation is practical. While critical analyses are useful for explaining the underlying assumptions and mechanisms involved in western-led environmental initiatives, they offer little practical advice that can be used by planners to improve project outcomes. Understanding how the discourse works in the project's vision and in practice can generate recommendations useful for planners in the agroforestry initiative. A critical discourse analysis can provide information on the gaps and inconsistencies between the project's objectives and their local implementation and expose the underlying assumptions that can undermine project success. Since the agroforestry project in Flora is likely to represent a "typical case" (Yin, 2003, p. 41) – which will be explained in more detail in section 3.1 – these recommendations are also likely to be useful for western-led carbon offsetting initiatives in the Amazon region in general.

1.1 Offsetting carbon in developing countries: Another form of neocolonialism?

The agroforestry project implemented by New Forest is part of a global carbon trading trend, which is becoming increasingly common in the Amazon region. Carbon trading has been adopted under the Kyoto Protocol as a global strategy for protecting existing rainforests and mitigating climate change (UNFCCC, 2012). For example, in 2008 the United Nations established the Programme on Reducing Emissions from Deforestation and Forest Degradation in Developing Countries (REDD), through which industrialized countries and private corporations can offset their greenhouse gas emissions (UN-REDD, 2008; 2009). They do this by financing a number of practices in forest regions like the Amazon basin "such as protecting existing forest cover, reducing deforestation, reforesting degraded areas, enhancing tree cover, and sustainable forest management" (Sabelli, 2011, p. 110). Private corporations and institutions

are also offsetting their carbon emissions on their own, by partnering with local communities and organizations that help them protect forest areas and generate carbon credits. This is the case with the institution from the UK mentioned in the introduction, which partnered with the New Forest foundation, which was already involved in the Amazon. Together, they aim to offset 80 tonnes of the institution's carbon emissions by planting trees in farmers' agricultural fields in Flora.

Similarly, New Forest's goal of "fostering sustainability"⁵ in Flora through carbon offsetting initiatives is embedded in a collective notion of "sustainable development" in the West. The 1987 report of the Brundtland Commission, in particular, "did much to bring the term 'sustainable development' into the popular consciousness and onto public agendas" (Elliott, 2009, p. 117). Indeed, carbon offsetting in the Kyoto protocol, as well as in private initiatives, is considered to promote sustainable development, and as such, is said to be a viable strategy for mitigating against climate change. While the term is traditionally understood as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (United Nations, 1987), some consider it to be an empty buzzword, that allows people in developing regions to continue emitting greenhouse gases under a business-as-usual scenario (see Peterson, 1997 and Schaltegger et al., 2006). In fact, carbon offsetting is seen as a form of "neocolonialism"⁶, where representing carbon offsetting as "sustainable" masks continued exploitation and unequal development between rich and poor countries under carbon offsetting initiatives (Gutiérrez, 2012).

⁵ New Forest uses the terms "sustainability" and "sustainable development" interchangeably.

⁶ In this study, "neocolonialism" is understood according to Kwame Nkrumah's definition, as "modern attempts to perpetuate colonialism while at the same time talking about 'freedom' (Nkrumah, 1964, p. 41; cited in Watts, 2009, p. 360). As such, neocolonialism in carbon offsetting schemes is the perpetuation of climate change and existing inequalities between rich and poor stakeholders, while talking about fostering sustainability.

We know that environmental initiatives can be neocolonial (Bachram, 2004; Backstrand & Lovbrand 2006; Baldwin 2009; Skutsch & Van Laake 2008), but we also know that, from another perspective, local people react to and resist these initiatives and undermine their power locally (Geoghegan, 2009; Nelson & Jong 2003). However, we have a limited understanding of how environmental projects can be exploitative at the macro scale and simultaneously resisted locally. These are two seemingly contradictory interests, which coexist in a way that produces environmental initiatives and outcomes that are less than ideal for both outsiders and villagers. Understanding how carbon offsetting projects are implemented locally can provide insights on this dynamic of exploitation and resistance.

1.2 Research purpose and objectives

The purpose of this study is to explain what happens when an international carbon offsetting project, reflecting western interests and ideas about sustainability, collides with the local realities of farmers living in a poor village in the Peruvian Amazon. I specifically focus on how New Forest's "sustainability discourse" operates in the village of Flora – that is, how its environmental vision, practices, and material realities are coordinated by the participants who together implement its agroforestry projects. Three research questions guide this study:

1. How is the New Forest foundation seeking to implement its sustainability discourse (its vision) in Flora, through the agroforestry project?

If the sustainability discourse is part of the global carbon economy and the West's collective imagination, then "sustainability" is likely to be a hegemonic discourse, reflecting western values and interests, and seeking to impose its environmental practices onto local Peruvians. This research looks at how the project is organized and implemented to see whether the

agroforestry project is an imposition of western environmental values and practices, or whether it includes local perspectives.

2. What happens to the sustainability discourse in the field, when a western carbon offsetting project is put into practice by different groups of people, including both local farmers and outsiders?

This requires investigating whether the material realities, mental constructs, and social practices of the discourse are sustained or rejected by project participants charged with implementing the agroforestry project in the village of Flora. As there are likely to be significant differences in power and wealth between outsiders (western staff and volunteers) and villagers (local farmers and project staff), each group may engage with the discourse differently. The concept of orientalism is useful for understanding whether outsiders reproduce the worldviews and practices of the sustainability discourse based on their own preconceived understanding of the environment and of local Peruvians. On the other hand, cultural hybridity is useful for explaining the local perspective and seeing whether farmers adapt the sustainability discourse to fit their own local needs and perspectives. However, hybridity can also happen amongst western staff and volunteers, if they adapt the sustainability discourse and achieve shared understandings of the project with local farmers.

3. Is the agroforestry project an example of neocolonialism, and if so is there something that planners can do to challenge the inequalities between outsiders and villagers?

This question investigates whether the agroforestry project can be considered neocolonial, as political economists would argue. In addition, understanding how the project works can inform on what can be done (if anything) to make carbon offsetting more egalitarian and potentially to challenge neocolonial relations. This study investigates whether including

critical thinking in the planning process and changes in the project's organization can help make the agroforestry project more egalitarian.

To answer these questions, the study is organized around the following objectives:

- 1. To identify and analyze the official “sustainability” discourse of the British foundation, as it appears on its website and in its reports, proposals, planning documents, and in the organization of the agroforestry project.**

Here I focus on the larger-scale material realities (e.g., the resources and economic transactions), mental constructs (e.g., representations, values, and identities), and social practices (e.g., the activities, and performances that are socially accepted) that are part of New Forest's official sustainability narratives, though a combination of archival research and interviews with project staff. These are narratives that guide what should be implemented locally in order to create a “successful” agroforestry project.

- 2. To identify how local participants (farmers, staff, and volunteers) reproduce, adapt, and/or reject the sustainability discourse of the agroforestry project.**

This objective examines whether the different types of participants actively promote, simply “go along” with, or in some way challenge or resist the sustainability discourse, through a combination of participant observation and interviews. Since participants are likely to behave differently in different situations (or to behave in ways that are not congruent with their attitudes about the project), this study looks at how they engage with the discourse in four different contexts: (i) in the organization, logistics, and planning of the agroforestry project; (ii) during the agroforestry planting and other project activities, when farmers, staff, and volunteers come together in the same space; (iii) when Peruvian villagers are alone, without interacting with volunteers and staff; and (iv) when volunteers and western staff are alone, without interacting with local farmers.

In short, the objective here is to systematically identify *who* (farmers, staff, volunteers) performs or does not perform (or agrees or does not agree with) *which components* of the sustainability discourse (material realities, mental constructs, social practices), *how* (reproduce, adapt, reject), and *when*.

3. To see if the concepts of orientalism and cultural hybridity are useful for explaining how New Forest's sustainability discourse works in the village of Flora.

I situate this case study in the broader theoretical debates surrounding how carbon offset projects work, the relationships between outsiders and villagers, and the dynamics of exploitation and resistance at different scales. I look at whether the concepts of cultural hybridity and orientalism are useful for explaining the relationship between outsiders and villagers, as well as the coexistence of neocolonialism at the macro scale and local resistance in Flora. Before beginning the research, I suspected that outsiders sought to impose their western conception of sustainability through orientalism – understood as the colonial process of stereotyping and representing people in non-western regions, which is intertwined with economic and cultural domination. I thought that local farmers, on the other hand, undermined this hegemonic discourse by adapting it in a way that produces cultural hybridity.

To carry out these research objectives, the agroforestry project in the Peruvian village is used as a case study, where I undertook field research from June to September 2011. The first stage consisted of collecting documents that the New Forest foundation used for planning and for advertising its agroforestry project. The second stage consisted of living in the village of Flora and participating in eight agroforestry activities where international volunteers and project staff traveled to the village to plant trees in fields owned by local farmers. During this time I used

participant observation and semi-structured interviewing to see how participants implemented the agroforestry project, how outsiders and villagers interacted, and how each group experienced the project.

While this research finds the sustainability discourse can indeed be seen as a form of neocolonialism (Baldwin, 2009), it also shows that this neocolonial relationship between western and local participants is more complicated than the view presented in the traditional political economy perspective (whereby environmental discourses are used to impose the West's political and economic control over developing regions and their resources). In particular, this study explains how and why neocolonialism can persist while facing significant limitations locally, and explains how farmers reproduce and even benefit from their orientalist relationship with outsiders. Contrary to my original assumption – that outsiders reproduced the sustainability discourse through orientalism while local Peruvians undermined it through cultural hybridity – this study finds that local farmers actively participate in the process of orientalism by deliberately keeping outsiders isolated from local perspectives. I find that cultural hybridity does not happen in this case study. As such, the sustainability discourse is maintained at the macro scale and can be said to be “neocolonial”, but only because in the village, local people benefit from feigning compliance with the sustainability discourse to receive economic benefits. I conclude with a practical application of my critical analysis, and suggest that planners should focus more on their relationships with local participants in order to challenge neocolonial relationships between rich and poor stakeholders.

1.3 Organization of the thesis

The rest of this thesis is organized as follows:

- Chapter 2 presents the different theories that inform this study, followed by a literature review explaining how previous studies have looked at environmental initiatives and hegemonic discourses. It then integrates different approaches to come up with an interdisciplinary strategy for critical discourse analysis.
- Chapter 3 begins by describing the case study approach that was used in this thesis. It then provides the research context, with background information on the British foundation and its agroforestry project. Finally, it explains the methods used in the data collection and analysis phases of the research.
- Chapter 4 presents the research findings and analysis, which are structured around the three research objectives: (i) identifying the British foundation's official sustainability narrative; (ii) identifying how the discourse is reproduced, adapted, and/or rejected in practice; (iii) seeing whether orientalism and cultural hybridity are useful for explaining the research findings.
- Chapter 5 outlines the significance of the research findings, provides recommendations that planners could use to improve the project's limitations, and provides concluding remarks.

Chapter 2 – Theoretical framework: Looking at environmental initiatives and hegemonic discourses through a critical lens

This study provides a critical analysis of the New Forest’s sustainability discourse, and explains how the discourse works in its agroforestry project that is implemented in Flora. In this thesis, the term “critical” is loosely understood as not taking the project and its concept of “sustainability” for granted as a common-sense solution to climate change. Instead, a critical perspective seeks to expose their underlying assumptions and “mechanisms of operation” (Gregory, 2010). In short, critical theory is useful for explaining *how* carbon offsetting projects work, and *why* they work the way they do. This makes critical approaches suitable for understanding how the sustainability discourse is implemented in the village of Flora, and helping explain whether there is a gap between vision and practice in New Forest’s agroforestry project.

This study shares two core principles with the critical theory promoted by the Frankfurt School of thought in the social sciences, which was spearheaded by Max Horkheimer in the 1930s but continues to be influential to this day. These include (i) synthesizing academic perspectives, and (ii) having a practical application for the research findings (Phillips, 2009). First, critical analysis in the Frankfurt School was meant to achieve synthesis by combining theories from a range of disciplines (*Ibid.*, p. 386). As Phillips (2009) points out, one of the goals of the critical approach promoted by Horkheimer was “the production of social theory capable of explicating the mediation of economic, psychological, and cultural facets of social life” (p. 385). In this study, I use a synthesized approach to discourse analysis. The theoretical framework that informs this research contains a holistic definition of discourse – considering its material realities, mental constructs, and social practices – and integrates theories from three different fields of study: linguistics, sociology, and cultural geography. An integrated approach can help

better understand how the agroforestry project works because it provides a nuanced analysis of the material, economic, psychological, and social components through which the agroforestry project comes into being as it is put into practice in the village of Flora.

A second core tenet of critical theory is that academic knowledge should contribute to the betterment of our society (Neuman, 2006, pp. 94-95; Phillips, 2009). In particular, critical analysis should have the “practical intent of criticizing and subverting social domination and exploitation” (Phillips, 2009, p. 386). In the context of the agroforestry project, exposing its discourse of sustainability and explaining how it works locally can be particularly useful since this information is not usually explicitly recognized by planners. Although the planners and funding agents working with New Forest are aware of the inequalities in wealth and power between themselves and local Peruvians, these inequalities are not addressed in a meaningful way in the planning process. Exposing power relations and explaining how they affect the agroforestry project can be empowering for the stakeholders who are at a disadvantage in the conditions and transactions involved in the carbon offsetting project.

But even if planners were receptive to critical perspectives – in fact, planners involved in the agroforestry project are seeking to improve their agroforestry project and are open to new perspectives – critical analyses are hard to translate into practice. They tend to focus on the major inequalities and injustices within the global economic system, but offer little practical advice that can be used by planners to help improve project outcomes. In this respect, many critical studies have fallen short of the original goal of providing a practical application for the knowledge they generate. This study, however, seeks to make the research findings applicable to the agroforestry project by making recommendations that planners could use to improve the

project and by reporting the findings to research participants (including the farmers, staff, and volunteers).

In sum, this thesis seeks to provide a critical analysis of the sustainability discourse in a way that is in line with the two central tenets of critical theory in the Frankfurt School: synthesis and practical application. The remainder of this chapter explains the theoretical and conceptual foundations that are used in an attempt to achieve these two goals. It begins by introducing the concepts and analytical tools used for understanding what discourses are and how they work, which include Paul Gee's definition of discourse with structuration theory and performativity theory. This is followed by an overview of the literature in human geography that has looked at environmental projects and neocolonial discourses, focusing on the concepts of cultural hybridity and orientalism. These two concepts are used to explain how project participants engage with the sustainability discourse and with each other, and to connect the findings to the academic debates on power, exploitation and resistance, and cross-cultural relations.

2.1 Three theoretical fields: Conceptualizing discourse, structure/agency, and performance

Three theories are combined to provide a holistic definition of "discourse" and to understand how it works in practice: (i) Paul Gee's definition of discourse, (ii) structuration theory, and (iii) performativity theory. Together they provide a guide to identifying New Forest's discourse of sustainability, explaining how it shapes the environmental and economic objectives of the agroforestry project, and understanding how local participants interact with and respond to the discourse in the village of Flora.

Paul Gee's definition of discourse

Before delving into how discourses work, it is important to understand what is meant by the term “discourse”. The most comprehensive definition comes from James Paul Gee’s manuals on discourse analysis. He defines discourses as language-based (either spoken or written) symbol systems, which comprise “social practices and mental constructs, as well as material realities” (Gee, 2011, p. 39). This definition differs from most approaches to discourse analysis, which generally define “discourse” only in terms of words and ideas. Although critical discourse analysis does recognize the socioeconomic contexts and material settings in which discourses take place (Fairclough, 2012), these material realities are not subjected to the same systematic analysis as the words on that appear on paper. Gee’s definition is particularly useful for this study because it ensures that the data collected through fieldwork covers the social, mental, and material components of New Forest’s sustainability discourse, and also provides a way to classify this information in the analysis.

In this study, “the sustainability discourse” therefore refers to these linguistics and symbolic forms – divided here into three categories: social practices, mental constructs, and material realities – through which New Forest’s agroforestry project comes into being. Social practices are “socially recognized or institutionally or culturally supported endeavor[s] that usually involv[e] sequencing or combining actions in certain specified ways” (Gee, 2011, p. 39). The involvement of European volunteers in Peru to help locals conserve their rainforest, young people wishing to help with conservation and community development projects, and their taking pictures of project activities in Peruvian villages are examples of practices comprised in the sustainability discourse. Mental constructs include representations, ways of knowing, logic models, identities, and stereotypes that are part of people’s collective imaginations. An example

of a mental construct promoted by the sustainability discourse is the characterization of “sustainability” as social, economic, and environmental well-being. Material realities are objects, physical layouts, elements of the built environment, “management systems” (Fairclough, 2001, p. 3), and symbolic exchanges (Gee, 2011). These include agroforestry fields, New Forest’s rainforest lodge, paper contracts, carbon credits, economic transactions, and so on. This study also considers the (uneven) socioeconomic contexts in which the agroforestry project is implemented – such as the living conditions of farmers, staff, and volunteers, their relative wealth, and the privileges experienced by westerners in the Peruvian village – which are unacknowledged material realities that intersect with the sustainability discourse.

Looking at the material, mental, and social components of the sustainability discourse helps achieve the kind of synthesis that is promoted by critical theory, which can give a more complex and nuanced understanding of how the agroforestry project works. Gee’s three components of discourse correspond nicely to the economic, psychological, and cultural dimensions of the agroforestry project that are analyzed in this research.

As outlined in the introductory chapter, one of the objectives of this study is to understand how farmers, staff, and volunteers engage with New Forest’s sustainability discourse – either by reproducing, adapting, and/or rejecting it. As such, I also borrow Gee’s interpretation of how people reproduce, adapt, and reject a discourse. According to him,

The key to Discourses⁷ is “recognition”. If you put language, action, interaction, values, beliefs, symbols, objects, tools, and places together in such a way that others *recognize* you as a particular type of *who* (identity) engaged in a particular

⁷ Gee (2011) distinguishes between the terms “Discourse” (consisting of language as well as other symbolic, social, and material elements) and “discourse” (which he uses to refer to language in a text or speech). Gee’s use of the term “Discourse” corresponds to what critical scholars understand as a discourse in the Foucauldian sense (i.e. comprising more than just language). For this reason, I leave the “big D” Discourse in Gee’s quotes but use the term “discourse” in the rest of this thesis.

type of *what* (activity), here and now, then you have pulled off a Discourse [...] Whatever you have done must be similar enough to other performances to be recognizable. However, if it is different enough from what has gone before, but still recognizable, it can simultaneously change and transform Discourses. If it not recognizable, then you're not "in" the Discourse (Gee, 2011, p. 35; original emphasis).

Following Gee's (2011) definition, I consider the sustainability discourse to be reproduced if it is performed by people "in the 'appropriate way' with the 'appropriate props' at the 'appropriate times' in the 'appropriate places'" (p. 35). However, it can be adapted if the discourse is "different enough from what has gone before, but still recognizable" (*Ibid.*). Conversely, a discourse is rejected if it is performed in a way that "is not recognizable" (*Ibid.*). This is not to be confused with contesting or challenging the sustainability discourse. In this study, rejecting the sustainability discourse simply means that local participants are not "in" the discourse, as Gee (2001) put it. While rejecting a hegemonic discourse can indeed challenge it in some cases, it can also mean that local participants are marginalized and excluded from the global governance and economic systems (Carrier & West, 2009).

In sum, this study uses Gee's interpretation of discourse to identify the material realities, mental constructs, and social practices of the British foundation's sustainability discourse both in vision and in practice, and to explain how local participants engage with the discourse. The project's vision consists of the objectives created by planners in Europe and the economic transactions between different stakeholders – these are the macro-structural conditions in which the agroforestry project is implemented. The "practice" is how the project is actually carried out locally, by farmers, staff and volunteers – this represents local agency.

Structuration theory

Giddens's (1984) structuration theory, from the field of sociology, offers a theoretical perspective that can be used to understand the relationship between structure and agency in the agroforestry project – that is, the relationship between the sustainability discourse in its official narrative and how local actors engage with it in practice. Discourses can be viewed as a type of “structure” because they serve as cultural repertoires that can influence people’s behaviours, interactions, thoughts, perceptions, and opinions (Said, 1979; Gregory, 2004). According to structuration theory, structure – or discourse – “exists only through the concrete practices of human agents [...] who reproduce social life through their routinized, day-to-day encounters” (Dyck and Kearns, 2005, p. 87). In addition, critical scholars such as Said (1979) and Gregory (2004) also consider that abstract practices such as imagining and representing also play an important role in reproducing dominant structures. But most important, structuration theory considers people to have the capacity to perceive and perform things differently, in ways that change and resist dominant structures. As Dyck and Kearns (2005) put it, despite their tendency to reproduce structural patterns, “individuals could have acted differently” (*Ibid.*). Similarly, Gee (2011) argues that “people are always, in history, creating new Discourses, changing old ones, and contesting and pushing the boundaries of Discourses” (p. 37). This study assumes that participants are not completely under the control of the discourse, but that they have the ability to reproduce it, to adapt it, or to reject it.

At the same time, we cannot fully understand issues such as neocolonialism, and other potentially problematic aspects of carbon offsetting simply by studying local agency – i.e., how local people react to environmental discourses. Once again, Gee’s understanding of discourse is

helpful for understanding the interplay between structure (i.e., the environmental sustainability discourse) and agency (how local participants interact with it). He states that

It is sometimes helpful to think about social and political [and economic, I would argue] issues as if it is not just us humans who are talking and interacting with each other, but, rather, the Discourses we represent and enact, and for which we are “carriers”. The Discourses we enact existed before each of us came on the scene and most of them will exist long after we have left the scene. Discourses, through our words and deeds, have talked to each other through history, and, in doing so, form human history” (Gee, 2011, p. 35).

There is some overlap between structuration theory and Gee’s understanding of discourse, where he views people as being “carriers” of discourses that structure collective behaviours over significant time periods. Gee’s perspective echoes the central tenet of structuration theory, which is that “social reality is being continually (re)produced and structured in space and time by competent actors in their everyday praxis” (Lippuner & Werlen, 2009, p. 39). For the agroforestry project, this means that the sustainability discourse can exist independently from local participants. However, for it to have power in the village and to influence the agroforestry project, project participants have to “carry” it and perform it locally, if only briefly.

Performativity theory

Performativity theory helps understand complexity and inconsistencies in how local participants engage with the sustainability discourse, and the differences between outsiders’ and locals’ performances within this kind of structure. To begin with, people do not always perform discourses in ways that are even and consistent. On the contrary, the same people may reproduce the sustainability discourse in a particular situation (when they are planting trees in farmers’ fields, for example) but reject it in other instances (such as when they are complaining about the

agroforestry project). Moreover, different groups of people (outsiders and villagers, in this case) are likely to perform the sustainability discourse differently, based on their different worldviews and socioeconomic positions. For example, while volunteers may accept the concept of sustainability and its principles, local farmers may feign compliance by only pretending to agree with the project objectives.

According to Gregory (2004), discourses are performed in the sense that they are literally “put into practice” (p. 18) in particular situations and in particular places. The sustainability discourse can be seen not just as structure, but also as a “cultural repertoir[e]” (*Ibid.*) that people use to behave (perform) in ways that are socially acceptable in particular situations. As Gee (2011) puts it, discourses provide ways of acting and interacting “in the ‘appropriate way’ with the ‘appropriate props’ at the ‘appropriate times’ in the ‘appropriate places’” (p. 35).

Thinking of people’s behaviours, opinions, and attitudes as performances means they are not fixed or essential. Instead, people can perform different and even contradictory discourses in diverse situations. As mentioned earlier, it is possible for project participants to internalize the sustainability discourse and reproduce it through their thinking and behaviour in some situations, but these same people can also reject it in other instances. What this study seeks to investigate is *whose performances* (farmers’, staff’s, or volunteers’) conform, or do not conform, to the dominant sustainability discourse, and *in which situations*. Looking at how participants perform the discourse in different situations, if at all, can shed light on its local limits and on its overall influence in the village.

This study distinguishes between two types of performance: the unconscious type of performance, as theorized by Butler (1997), and the more deliberate kind that is suggested by Goffman (1959). This distinction can explain differences between how outsiders and villagers

participate in the agroforestry project and engage with its sustainability discourse. On one hand, discourses can be understood in the Foucauldian sense, as hegemonic worldviews and associated practices, which condition how people think, behave, and interpret their environments (Butler, 1997; Gregson & Rose, 2000). Participants perform the sustainability discourse unconsciously if they internalize it and interpret its goals, values, and activities as natural and common-sense. A stereotypical example is when people from the West take the idea of sustainability for granted, and see it as an unproblematic climate change mitigation strategy. Another example of unconscious performance is “westernization”, where people living in communities in developing countries internalize western environmental discourses and values (see Agrawal’s (2005) case studies on “environmentality”).

On the other hand, discourses can be performed deliberately, in the theatrical sense, where some people may “play along” and behave in ways that sustain dominant worldviews without internalizing them (Goffman, 1959; Gregson & Rose, 2000). A common example is when local people feign compliance to western worldviews and present themselves in ways that feed the stereotypes in order to participate in environmental projects and enjoy their economic benefits, or as strategic participation to achieve their own goals.

Although the difference between conscious and unconscious performances is not always clear⁸, this difference is worth keeping in mind when looking at how the agroforestry project is implemented because it is happening in a cross-cultural setting. As will be explained in Chapter 4, New Forest’s sustainability discourse is based on western worldviews and values (that are also rooted in their material conditions and western privilege), which are different from local

⁸ In his (1993) paper on the performative character of magic in Greece, Vassos Argyrou argues that whether people actually *believe* in their particular worldviews and practices (magic, in his case) is not relevant. Rather, people will perform a discourse based on whether it is *appropriate* in a specific time and place, and whether it serves their interests. It is also possible for people to believe/internalize the same discourse in some situations, but not in others.

perspectives. In this context, the difference between conscious and unconscious performances can explain how and why different groups of participants (farmers, volunteers, and staff) engage with the discourse. For example, do volunteers internalize its worldviews and perform it unconsciously while farmers feign compliance and perform it in the theatrical sense? Likewise, differences in how outsiders' and villagers' performances can also help identify power relations between participants. For example, farmers may feign compliance because they are not in a position to challenge the agroforestry project and its western environmental values. On the other hand, international volunteers, who paid money and travelled to Peru to experience "conservation in action", may internalize New Forest's mission to foster sustainability in local village. At the same time volunteers' western worldviews may be reinforced by the staff and local farmers, who, in an attempt to give volunteers a "positive" agroforestry experience, may avoid challenging their beliefs about sustainability, about the rainforest, and about local people.

Together, Gee's definition of discourse, combined with structuration theory and performativity theory, provide the tools and concepts to identify New Forest's sustainability discourse and explain how it operates in the village of Flora. What follows is a review of debates about international environmental projects, neocolonial discourses, and their local responses. I present the local, political economy, and orientalism perspectives on these issues, and explain how they can be useful for understanding the relationship between outsiders and villagers, their engagement with the sustainability discourse, and the dynamics of exploitation and resistance in carbon offsetting initiatives.

2.2 Debates surrounding the implementation of western environmental discourses in developing regions

In human geography, scholars have looked at environmental discourses from two main perspectives. On one hand, there is the “local perspective”, consisting of in-depth case studies that focus on how local beneficiaries respond to environmental projects and their discourses. Many of these studies use cultural hybridity – understood here as mixing and adapting different discourses (Canclini, 2005) – to explain how local people resist and adapt hegemonic discourses in a context of socioeconomic inequality between outsiders and villagers. Other studies, on the other hand, outline the global political economy of offsetting carbon and other environmental initiatives that occur in developing countries. These studies outline the flaws in the design of environmental projects, and emphasize their exploitative nature. However, this political economy perspective is limited because it has a tendency to reduce the relationship between outsiders and villagers to an economic one (Agrawal, 2005; Gidwani, 2008). For this reason, I also use the concept of orientalism to examine whether the colonial legacies of stereotyping and representing people in non-western regions are present in the agroforestry project. The concept of orientalism has not been applied to the study of environmental discourses in the context of carbon offsetting, but I consider it to be particularly useful in understanding how international carbon offsetting projects work in Peru. In particular, looking at westerners’ preconceived beliefs about sustainability, in combination with their socioeconomic advantages in relation to villagers, can be useful for understanding why it may be hard for outsiders to truly understand local realities.

Below, I explain the local perspective, the political economy perspective, and the orientalism perspective. I outline their contributions to the understanding of environmental discourses, point out their limitations, and discuss the areas where they converge.

The local perspective

Scholars focusing on the local perspective argue that it is not easy to impose dominant environmental discourses in poor villages because local people are not passive recipients of western worldviews, practices, and projects. Instead, villagers negotiate environmental projects and their discourses, and adapt them to fit their own needs and perspectives (Canclini, 2005; Gheogheghan, 2009; Pieterse, 2009; Sundberg, 2006). In particular, scholars have used the concept of cultural hybridity to show how dominant environmental discourses are undermined locally, by being adapted to local needs and perspectives (Canclini, 2005; Gheogheghan, 2009). This study uses Canclini's definition of hybridity, which, according to him, involves "socio-cultural processes in which discrete structures or practices, previously existing in separate forms, are combined to generate new structures, objects, and practices" (p. xxxi). In the agroforestry project, hybridity would happen if the sustainability discourse is altered and combined with local discourses or perspectives.

However, Canclini specifies that "hybridization is not a synonym for fusion without contradiction" (p. xxiv). Indeed, cultural hybridity often happens in a highly uneven context, where there are economic and power inequalities between different groups. In the agroforestry project, there are likely to be deep socioeconomic inequalities between outsiders and locals. As such, cultural hybridity is necessarily considered within the political economic context where environmental projects take place.

Hybridity is usually understood as a process through which villagers *adapt* hegemonic discourses, usually by mixing them with aspects of local culture and with local discourses. Gheogheghan (2009) sees it as "the proces[s] of adapting imposed ideas, institutions and technologies," amongst other things, to local people's own "understanding of local situations and

needs” (p. 112). For example, some scholars argue that local people find ways to benefit from environmental initiatives without implementing them as they were originally planned, and without internalizing the western worldviews they promote (Mosse, 2004; Gheogheghan, 2009; Garner, 2009).

Scholars also see hybridity as a type of resistance to hegemonic discourses – not necessarily direct resistance, but still a process that undermines western power. Indeed, hybridity can be a process through which western and local cultures can transcend the “us-versus-them” dualism common in neocolonial discourses. This allows for the coexistence of multiple identities, and for the formation of new ones. According to Canclini (2005)

Hybridization, as a process of intersection and transaction, is what makes it possible for multicultural reality to avoid tendencies towards segregation and to become cross-cultural reality. Policies of hybridization can serve to work democratically with differences, so that history is not reduced to wars between cultures, as Samuel Huntington imagines it. We can choose to live in a state of war or in a state of hybridization” (p. xxxi).

Again, this is not to be confused with the harmonious coexistence of different perspectives. On the contrary, there is often conflict between different views, but the point is that different perspectives still manage to coexist. This way, villagers are not becoming westernized, nor are they in violent conflict with outsiders since there is no us versus them dualism. As Pieterese (2009) argues,

[h]ybridity does not preclude struggle but yields a multifocus view on struggle and, by showing multiple identity on both sides, transcends the “us versus them” dualism that prevails in cultural and political arenas (p. 145).

This study uses cultural hybridity as a lens through which to interpret and explain how local participants engage with the sustainability discourse in New Forest’s agroforestry project. Looking at whether new hybrid discourses that emerge through this cross-cultural interaction can help better understand how western led environmental projects are really implemented in the

field. In turn, this type of information can be useful for project planners, who may need to revise project goals in order to better align them with local realities.

While the concept of cultural hybridity can be useful for understanding how New Forest's sustainability discourse is adapted locally by all three groups of participants (farmers, staff, and volunteers), the concept has usually been limited to the study of how local villagers (and other subaltern groups) react to hegemonic discourses. This leaves out the outsider perspective, and instead, local people's behaviour is considered to some degree in isolation from the western initiatives to which they are reacting. However, cultural hybridity alone is not enough for understanding how New Forest's sustainability discourse works as a whole, as it is missing the macro-structural perspective. In fact, studies in cultural hybridity have been criticized for romanticizing local adaptations to western discourses, and for not taking into account the macro-scale capitalist and governance regimes that exert their power in spite of local resistance (Heyman, 2009).

The following sections look at the political economy and orientalism perspectives, and explains how they can be useful for understanding how the sustainability discourse works at the macro scale. They also help understand the outsider perspective, explaining how westerners engage with their own hegemonic discourses.

The political economy perspective

According to critical scholars in the field of political economy, international environmental projects are inherently exploitative. Carbon offset schemes are considered to be forms of neocolonialism – another way of establishing the West's political and economic control over natural resources in developing regions (Bachram, 2004; Backstrand & Lovbrand, 2006;

Bumpus & Liverman, 2008). As Mosse (2006) points out, some scholars argue that the real but hidden objective of environmental initiatives is to maintain the West's political and economic control over resources in developing regions. When it comes to determining whether carbon offsetting is neocolonial, a political economy perspective would argue that there is indeed a disconnect between rhetoric and "reality" – the economic relations that put local stakeholders at a disadvantage.

Political economists have exposed the neocolonial features of carbon offsetting by looking at its discourses of development and environmental conservation. Many studies have explained how environmental organizations present an unproblematic image of environmental initiatives, which simultaneously obscures and maintains the unequal economic and power relations between western and local stakeholders (Baldwin, 2009; Bakker, 2010; Putz & Redford, 2009; Smith, 2007). Scholars also argue that carbon offsetting is bound to fail, because it operates within the same economic system that reproduces inequalities between rich and poor countries, as well as the environmental problems they aim to address (Putz & Redford 2009; Smith, 2007).

But studies in political economy are largely focused on explaining how carbon offsetting works from a neocolonial perspective, emphasizing the agency of outsiders, leaving out the role of local people in influencing project outcomes. As Gregory, 2001 points out, "the production of colonial knowledges *of* other cultures [...] also depends *on* the active involvement of those other cultures" (Gregory, 2001, p. 86; original emphasis). This study considers both "(neo)colonizer" and "subaltern" perspectives by looking at how outsiders and villagers participate in New Forest's agroforestry project together and at how they both engage with its sustainability discourse. In addition, the political economy perspective does not always consider *how* people

are supposedly being exploited and misled. For example, are villagers aware they are being exploited? Are outsiders purposefully exploiting local people? Or are they both disconnected from the hegemonic discourses at the macro scale? Understanding what produces gaps between vision and practice, or problems between outsiders and villagers, also requires integrating the themes of perception and psychology to the study of carbon offsetting projects and their local implementations.

For this reason, I also draw on the concept of orientalism to understand interactions between westerners and villagers, and the dynamics of exploitation and resistance. Like the political economy perspective, orientalism is particularly useful for understanding how westerners engage with hegemonic discourses at the macro scale. It is less useful for understanding local perspectives because its main focus is explaining how westerners draw on hegemonic discourses to represent and speak for “the other”. However, it complements the political economy perspective by adding cultural and psychological components of to the economic dimensions of carbon offsetting.

The orientalism perspective

The concept of orientalism was developed by Edward Said (1979) and later used by scholars such as Derek Gregory (2001, 2004) to explain how westerners engage with hegemonic discourses. Central to the concept of orientalism is the colonial process of “othering”, which refers to how westerners construct knowledges about other (non-western) places and the people in them. They attribute qualities to these people and places based on their own stereotyped and preconceived views. “The other” is typically not allowed to speak for her/himself, and is not

recognized as having the ability to do so anyway. Othering involves binary thinking, where “the other” (people in non-western regions) is qualified in relationship to “us” (westerners).

Discourses are central to the process of othering because, as mentioned previously, they serve as “cultural repertoires” (Gregory, 2004) – images, ideas, representations, and so on – which are drawn upon to construct knowledge and to interpret situations. This is not to say that discourses of the other are not without their contradictions (Rose, 1999), and that westerners may not witness or experience things that contradict their views. However, they are likely to reinterpret these contradictions in ways that conform to dominant discourses, as interpreting otherwise would challenge their worldviews and their position within them (Gregory, 2004). As such, Orientalism is a form of “cultural hegemony” (Said, 1979, p. 7), where westerners project their worldviews onto other people and places⁹.

However – and this is where the orientalism and political economy perspectives converge – the West’s hegemonic power depends in great part on its position in relation to the orient (or local villagers, in this case). According to Said (1979), “Orientalism depends for its strategy on this flexible *positional* superiority, which puts the Westerner in a whole series of possible relationships with the Orient without ever losing the upper hand” (p. 7; original emphasis). In the context of western-led environmental projects, outsiders have political, economic, and social advantages – such as wealth, education, the ability to travel, the capacity and option to implement an environmental project, and so on – which put them in a position of power in

⁹ More recent studies on western environmentalist culture reveal a similar pattern of cultural hegemony within environmental projects in poor communities – a form of power/knowledge referred to as “virtualism” (Argyrou, 2005, 2009; Carrier & West, 2009). Virtualism happens when the West “construct[s] a vision of the world, which it takes to be reality itself, and attempts to make the world conform to it” (Argyrou, 2009, p. 24). In this study, however, I use the concept of orientalism to look at the agroforestry project instead of “virtualism”. This is because orientalism is older, and has been developed by scholars (including Said, Gregory, and Spivak) to provide a complex understanding of the relationship between westerners and locals, and the dynamics of oppressor/subaltern.

relation to villagers. These socioeconomic advantages enable them to travel to Peru and implement the agroforestry project with confidence and conviction.

In other words, westerners exert cultural hegemony over local people simply because they can – not because they have better ideas, capacity, or knowledge. As Said put it, “[t]he scientist, the scholar, the missionary, the trader, or the soldier was in, or thought about, the Orient because he *could be there*, or could think about it, with very little resistance from the Orient’s part” (*Ibid.*; original emphasis). This emphasis on the political economy that enables westerners to impose their perspectives onto the other in developing countries has not been given its due attention in scholarly literature. Instead, scholars working with the concept of orientalism tend to focus on words and images and not so much on its material and economic components that are responsible for the West’s positional superiority vis-à-vis the other. This study seeks to address this limitation by including this material/socioeconomic component of orientalism to the study of New Forest’s sustainability discourse and its implementation in the village of Flora. If “sustainability”, like orientalism, is a (neo)colonial discourse, then using Gee’s definition of discourse to identify its material, mental, and social components will help capture both its cultural and material/economic dimensions. This can help assess whether it can be considered an extension of a colonial discourse that reinforces colonial stereotypes of an “other” that is in need of western expertise to overcome their environmental dysfunction.

From another perspective, orientalism can potentially be useful for looking at how “the other” engages with western discourses, thereby converging with the cultural hybridity view. Indeed, another characteristic of orientalism is the seemingly little resistance that westerners face from the other. Said hints that the West’s positional superiority is a possible reason why local people comply with outsiders’ worldviews and expectations. For example, if villagers benefit

economically by complying with outsiders' projects and worldviews (again, because outsiders are in a position to supply resources and other benefits as they are richer than locals), then it would be against their interest to resist and challenge outsiders. Spivak (1987) offers another reason for the apparent lack of local resistance, which is that villagers use the tools of the colonizer to express themselves when they interact with outsiders. She argues that subaltern groups use the vocabulary and logic models of the colonizers to express themselves when they enter the discursive space created by westerners (Tolia-Kelly, 2009). According to her, villagers reproduce dominant western discourses without necessarily internalizing them, but without being able to step out of the discourse either. If this happens with local farmers in the agroforestry project, then orientalism could also be useful for looking at the local perspective, but only insofar as they comply with western discourses. This is different from the process of cultural hybridity, where locals adapt western discourses to their own realities. In practice, however, both processes could happen. Field research gives the opportunity to look into the "other side" of orientalism, and see how locals engage with orientalism and dominant western discourses.

2.3 Summary

Thus far, scholars have looked at the processes of cultural hybridity, neocolonialism, and orientalism separately, by either focusing on the West and its colonial discourses, or on how local villagers respond to hegemonic discourses. When considered separately, each of these perspectives has limitations. Studies in cultural hybridity can romanticize local adaptations to western discourses, without considering broader power struggles between outsiders and locals. The political economy perspective tends to overemphasize the macro-scale economic structures, without considering the role of local agency. Similarly, the concept of orientalism tends to focus

on the macro scale, emphasizing images and representations in the West's geographical imagination, without examining the perspectives of local people (of the "other"), and it does not explain their role in altering western discourses.

But at the same time, there is considerable overlap and complementarity between these three perspectives. Integrating them can provide a nuanced analysis of New Forest's sustainability discourse, in a way that combines both macro/micro and local/outsider perspectives. This study integrates the concepts of cultural hybridity and orientalism within its analysis, and uses them as lenses to interpret how local farmers, project staff, and international volunteers engage with the sustainability discourse, and with each other. The political economy perspective is not included as a separate lens because the concepts of orientalism and cultural hybridity already include the socioeconomic differences between outsiders and villagers.

Together, the five theories used in this study explain how the agroforestry project appears in New Forest's vision and in practice, and explain how the relationships between the macro and micro scales and between outsiders and villagers influence project outcomes. Figure 1 summarizes the theoretical framework.

Figure 1: Integrating approaches to understand carbon offsetting projects

Gee's definition of discourse, with structuration theory and performativity theory provide the general framework for how the agroforestry project works at the macro scale and in the village of Flora. They inform the parameters of the study:

- Structuration theory tells us there is a relationship between the sustainability discourse at the macro scale and how it is carried out in practice, whereby structure and agency mutually sustain each other (represented by the thick line between the macro and micro levels).

- Gee's interpretation of discourse provides a way of defining and classifying the sustainability discourse (in terms of its material realities, mental constructs, and social practices – which, for the purpose of simplicity, do not appear on the diagram); and tells us that people who implement the project in Flora can reproduce (represented by the solid, straight line), adapt (curvy line), and/or reject (dotted line) the discourse.
- Performativity theory tells us that people can behave differently in different situations, and as such this study looks at how participants engage with the sustainability discourse in four different local situations (represented by the four adjacent rectangles at the local level).

Orientalism and cultural hybridity are the “mechanisms of operation” (Gregory, 2010) that mediate the relationship between outsiders and villagers, and between the macro and micro scales. These concepts are tested in the field, to see if they are useful in explaining *how* and *why* the sustainability discourse works the way it does, as well as the nature, or outcomes, of the agroforestry project (i.e., whether it is a form of neocolonialism).

Chapter 3 – Research approach and methodology

This chapter outlines the research approach and methodology. I begin by explaining why a case study approach is most appropriate for this thesis. I then describe the area of study, and explain how I established a relationship with the New Forest foundation and recruited research participants. Finally, I outline the methods used for data collection and analysis.

3.1 Case study approach

The agroforestry project is used as a case study to investigate how the New Forest foundation's sustainability discourse appears in the project objectives set by planners, and to analyze how local farmers, project staff, and international volunteers implement the agroforestry project in the village of Flora. A single case study approach was chosen for three main reasons.

First, limiting the research scope to one case study made it possible to conduct an in-depth study on how the sustainability discourse works within the agroforestry project by looking at a range of different categories – three components of discourse (material realities, mental constructs, social practices), three groups of participants (farmers, staff, volunteers), three possible actions (reproduce, adapt, reject), and four different situations (organization, tree-planting activity, farmers alone, and outsiders alone).

Second, this project represents a “critical case” (Yin, 2003, p. 40), where I test the concepts of orientalism and cultural hybridity, to see if they are useful for explaining the relationship between outsiders and villagers, and how they both interact with the sustainability discourse. According to Yin's (2003) book on case study research, a single case study can be used to “confirm, challenge, or extend the theory [if it] meet[s] all of the conditions for testing the theory” (*Ibid.*). The agroforestry project is ideal for testing the two concepts because it creates a space where outsiders and villagers come together to work in the same project. It is

possible to see how these two groups interact, how they engage with the sustainability discourse, and whether the cross-cultural relations that are formed play out according to the patterns proposed by the concepts of orientalism, cultural hybridity, both, or neither. Moreover, the way in which the agroforestry project is organized gives the opportunity to analyze how participants reproduce, adapt, and/or reject the discourse in different situations. Looking at whether participants perform the discourse differently in various situations is crucial for determining if the processes of orientalism and cultural hybridity happen or not, as participants' behaviours are not constant but vary according to the context.

Third, the agroforestry project is also likely to be a "typical case" (Yin, 2003, p. 41) that is representative of most international carbon offset initiatives in the Amazon region. Similarly to other carbon offset schemes, the agroforestry project is a market-based approach based on voluntary participation, carbon is offset based on the additionality principle, and the project requires collaborations between outsiders and local villagers. This allows for the research findings to provide insights that may be applicable to other carbon offset schemes.

The following section describes the case study in question, providing background information on the New Forest foundation, and the village where it occurs.

3.2 Research partners and participants

This section explains how I made contact with the British foundation and how I recruited research participants. It then gives background information about the participants.

Contacting the British foundation

I first became acquainted with New Forest and its agroforestry project in August 2010, when I volunteered for four weeks at the foundation's rainforest lodge located near the village of

Flora, where the agroforestry project is implemented. In January 2011, I contacted a staff member by email to inquire if I could conduct a research project regarding their agroforestry initiative. I was asked to submit a brief description of my research, which was approved by the director of the foundation and I was given permission to conduct the research. I was allowed to spend time with the staff and volunteers at New Forest's lodge in the rainforest, and to participate in their agroforestry activities in the village of Flora, located at about nine kilometers from the lodge.

Recruiting research participants

International volunteers – I introduced myself to potential research participants as a student researcher from Canada, and told them I was interested in their views and experiences about the agroforestry project. I approached the volunteers myself and told them that although I have volunteered with the foundation in the past, I was a student researcher – not a volunteer or part of the staff, and that I had no decision-making power that might affect them. Volunteers were required to sign a written consent form, which informed them of my broader research topic, research methods, and contact information. The consent form also informed them that their participation was voluntary and that they could withdraw at any time, and that the information they provided during interviews was confidential. They were also given the option to opt out of being recorded during interviews.

Project staff – I did not have to “recruit” the project staff, since administrators in Cusco and London informed them about my coming to Peru to conduct a research project, prior to my arrival. They agreed to participate in my research by answering the questions I had about the

agroforestry project. They did not feel comfortable signing consent forms as their jobs were tied to their participation in the agroforestry project, and felt their answers could reflect poorly on their performance. Two of the four staff members on duty agreed to be interviewed (giving oral consent), and they all agreed to be recorded when they gave presentations about the foundation's community projects to volunteers.

Local farmers – I was introduced to the farmers by the one local staff member who lived in Flora, who brought me to their houses or introduced us in the village. I introduced myself to farmers and their wives again as a student researcher from Canada interested in their views about, and experiences with, the agroforestry project. I obtained verbal consent from farmers, as I was informed by the staff that asking them to sign consent forms would be inappropriate.

My presence as a Canadian in Peru raised two potential ethical issues with local farmers. First, farmers may have felt pressured to participate in my research because of my position as a western-educated researcher and my relationship with the New Forest foundation. The second issue involved the relationship between the foundation and local farmers, who benefit economically from the agroforestry project. In this case, reporting the results of my findings could potentially harm the relationship between the two parties. To help minimize these two potential ethical conflicts, I explained to farmers that their participation would be voluntary, that their responses were confidential, and that they could withdraw from the study at any time. I told them that if they decided to withdraw from the study, their relationship with me or with the foundation would not be affected. I also made it clear that I was not part of the foundation – that I was not one of the staff or the volunteers – and did not have any resources, or decision-making power regarding the agroforestry project.

Description of the people participating in the agroforestry project

At the time of the field research, there were three western staff members at the lodge, each staying between one and two weeks as part of a staff rotation system. There was also a constant flow of international volunteers who participated in the agroforestry project, each staying in the rainforest area between two weeks and several months. There were 15 volunteers in total at the time of my field research. In addition to the three foreign staff members, there was one local staff member who stayed at his house in the village, and who made occasional trips to the lodge to bring volunteers to the village and to meet with the western staff to help with project coordination. The farmers lived in the village of Flora, located at about nine kilometers from New Forest's rainforest lodge. At the time of the research, there were ten households participating in the agroforestry project.

Distinction between "outsiders" and "villagers"

A relevant distinction between participants in the agroforestry project is the difference between villagers and outsiders, that is, between farmers and the one staff member who lives in the village, on one hand, and western educated staff and international volunteers, on the other. In this study, outsiders are the volunteers and staff who come from European countries and from the cities of Cusco and Lima. I also consider the staff from Cusco and Lima to be outsiders because when it comes to their role in the agroforestry project and to their environmental views, they have much more in common with people from Europe and North America than with people who live in the Amazonian village. The Peruvian staff were educated in Peruvian universities, with programs based on the European and North American models.

As will be shown in the research findings, the divide between outsiders and villagers is not simply conceptual. This distinction was drawn from field research, where there appeared to be a clear division (in terms of wealth, power, and environmental views) between local staff and farmers on one hand, and the volunteers and staff who come from outside the village, on the other. The agroforestry project created spaces of encounter between outsiders and villagers, and provided opportunities for cross-cultural relations between these two groups. The relationship between farmers, staff, and volunteers played an important role in shaping how they interacted and how they participated in the agroforestry project, as well as influencing project outcomes.

Researcher positionality

In this study, I do not aim to “speak for” the research participants. Rather, the research findings reflect my own experience in Flora, and are therefore partial. Furthermore, it is important to acknowledge that I am embedded in the process of “neocolonialism” through my presence and work as a Canadian student researcher in Peru. Ironically, my ability to conduct research in the Peruvian Amazon is based on same inequalities in wealth and power that I am critiquing in my study. It is also important to recognize that these issues cannot be resolved, in spite of my efforts to conduct the research in an ethical and sensitive manner.

3.3 Research methods

The objective here is to identify New Forest’s sustainability discourse at two different scales. First, I seek to identify the material realities, mental constructs, and social practices of the sustainability discourse at the macro-structural scale. These are the dominant representations, ideas, carbon economy, etc., involved in the agroforestry project and the West’s collective

imagination. Second, I seek to identify the material realities, mental constructs, and social practices of the sustainability discourse at the micro-behavioural scale. These are the products of people's participation in the agroforestry project, their engagement with the dominant discourse, and the social dynamics between different participants.

To achieve these objectives, I conducted archival and field research over a period of three months, where I spent time both in the local village and in the foundation's lodge in the rainforest. I spent a total of 25 days in the lodge, where I interviewed volunteers and interacted with them on a day-to-day basis. Spending time at the rainforest lodge with volunteers allowed me to get to know them, share experiences, and place their interview responses in context. However, I spent most of my time in the village – a total of 62 days – where I stayed in a “hostel” owned by one of the villagers. I regularly interacted with some of the farmers that participated in my study, and with other members of the community.

I collected qualitative data using three different methods: (i) document analysis, where I looked at the foundation's website and planning documents; (ii) participant observation, where I spent time with farmers and the local staff in the village, and with western staff and volunteers at the rainforest lodge; and observed how participants used the sustainability discourse in four particular situations – the organization and planning of the agroforestry project, encounters between outsiders and villagers, farmers alone, and western staff and volunteers alone; and (iii) semi-structured interviews, with farmers, staff, and volunteers.

For the analysis, the data obtained through these three methods was interpreted and organized according to the theoretical framework. The sustainability discourse is classified according to Paul Gee's definition of discourse, and tested against the concepts of cultural hybridity and orientalism.

3.3.1 Data collection

The research methods used to collect data on the New Forest foundation's sustainability discourse in vision and in practice are summarized in the following table:

Table 1: Methods for data collection

Method	Source of data	Purpose
Document analysis	The foundation's website and project documents (proposals, reports, guides, and descriptions)	To identify the official "sustainability" narrative of the British foundation
Participant observation	Project staff, volunteers, and farmers participating in the agroforestry project	To observe how the project is organized, the interactions between participants, the conversations taking place, and the comments being made.
Semi-structured interviews	Project staff, volunteers, farmers, and other villagers	To ask staff about how the agroforestry project is organized; to ask all participants about their views, experiences, and behaviours related to the agroforestry project

Document analysis

I collected documents produced by the British foundation that described its purpose, objectives, and activities. These included pages from its website, which contained the statement of purpose and objectives (its broader vision) and a general description of its research and community projects, as well as pages that advertised the foundation and its projects to potential volunteers and collaborators. The website also contained pages with more specific project descriptions and guides for the volunteers.

I was also given access to other documents which were not available on the website. These included:

- A management plan documenting how the foundation was organized and that describes its various activities.
- Project proposals that were submitted to a funding agency, to help finance the agroforestry project
- Planning documents that provide detailed descriptions of the agroforestry project containing information on the arrangements between the European institution, the British foundation, and the local farmers. These documents also contained a list of specific goals and activities the foundation sought to implement in the village (e.g., quotas for the number of farmers recruited and agroforestry fields created; goals for environmental education), through which the foundation's vision would be implemented locally.
- Progress reports written by the project staff, documenting the participating families, the number of trees being planted, successes and challenges, and overall progress of the agroforestry project.
- Copies of the paper contracts with farmers.

These documents were especially useful for explaining how the sustainability discourse works at a macro scale, as seen by project planners working from offices in Cusco and London. The information helped identify the structural factors (economic, political, and ideological) that influence how the project is implemented locally.

Participant observation

Participant observation was useful for getting a feel of the “everyday experience” (Hay, 2010, p. 245) of farmers, staff, and volunteers as they participated in the agroforestry project. According to Hay (2010) “the goal of participant observation is to develop understanding through being part of the spontaneity of everyday interactions” (p. 245). He also describes four different levels of participation, including complete observer, observer-as-participant, participant-as-observer, and complete participation (Table 2).

Table 2: Hay's four levels of participant observation

1	Complete observer	For example, a psychologist watching a child through a one-way mirror or a prisoner being observed through closed-circuit TV cameras
2	Observer-as-participant	For example, a newcomer to a sport being part of the crowd
3	Participant-as-observer	For example, seeking to understand social change in one's own locality
4	Complete participation	For example, living in a rural settlement to understand meanings of sustainability

(Adapted from Hay, 2010, p. 246)

For the most part, my level of observation was closest to complete participation over a limited period of time. I immersed myself completely in the area of study for three months, living both in the local village and staying at the rainforest lodge.

When living in the village, I interacted and conversed with farmers and other villagers, and participated in everyday village life: I was eating at local places, buying things in the shops, taking the local bus to travel, helping with household and farming chores, and so on. In the rainforest lodge, I was living amongst the western staff and international volunteers. We all shared the same space at the lodge, and I participated in some of the volunteer activities conducted by the staff, such as going on hikes, helping with the biology projects, and partaking in the agroforestry and biogarden projects.

I was a participant observer by virtue of living in the same places as my research participants. In these situations, I was not always performing my researcher role and actively seeking to extract information from participants (like in the interviews). At the same time, however, I was very sensitive to information or experiences that were relevant to my research topic and that gave me information about the sustainability discourse. When conversations about agroforestry, conservation, the New Forest foundation or other NGOs, and about foreigners

arose, I often followed up with questions that would help me better understand people's views on the topic, and help answer my own research questions. At the end of each day, I recorded my observations and experiences in a diary, as field notes. My field notes also included the informal email communication with the foundation's owner and a project planner in charge of agroforestry, who both lived in London.

There were four specific situations in which I was actively performing my role as a researcher and in which I paid special attention. As mentioned previously, these included (i) the organization and planning of the agroforestry project, logistics, and implementation of the agroforestry project, (ii) encounters between outsiders and villagers, (iii) my experience with farmers alone, and (iv) with outsiders alone. These four situations stood out to me as four distinct instances in which research participants could potentially reproduce, adapt, and/or reject the British foundation's sustainability discourse. The following sections explain them in more detail.

The organization, logistics, and implementation of the agroforestry project – I was observing how the project staff carried out the agroforestry project in practice, and how they used the sustainability discourse in this process. I was interested in how the project is presented to volunteers and to farmers and how participants are recruited (i.e., whether the staff use the concept of sustainability to talk about the project, and whether they present it differently to volunteers and farmers). I wanted to know how the staff scheduled their time and efforts in implementing the agroforestry project and trying to meet project demands, while simultaneously meeting the demands or expectations of the farmers and volunteers. I observed how the staff

behaved in three situations: when they presented the project to international volunteers, how they recruited local farmers, and how they monitored farmers' fields after the trees had been planted.

First, I was present when the staff introduced and explained the agroforestry project to new volunteers I attended three different presentations in total. Second, I accompanied the local staff member as he recruited new potential farmers that might be interested in participating in the agroforestry project. I accompanied him as he recruited five different families. Third, I accompanied staff when they visited participating farmers to check up on their fields and to see if they have any problems, questions, or concerns. I accompanied the staff on two separate occasions.

In these last two situations, the staff introduced me to farmers as a student researcher and told them that I am here to learn about the agroforestry project. At this stage I did not ask farmers any questions, as my goal was to observe the interactions between the staff and the farmers. I told the staff that I was not there to evaluate how they did their work, and that I was not judging them. As for the farmers, I noticed they were more concerned about their agroforestry fields and were busy interacting with the staff, and did not seem to pay much attention to me.

Encounters between outsiders and villagers – I also wanted to observe encounters and interactions between outsiders and villagers in order to see how each group used the sustainability discourse when they were in the same space. Volunteers got a chance to interact with farmers and with the local staff during the tree-planting activity, when they travelled to the village to plant trees in farmers' fields. I was an active participant myself in the tree-planting activity, where I helped clear the fields and plant trees alongside the farmers, staff, and volunteers.

Farmers alone – I also spent time alone with farmers, when the staff and volunteers were not present. I visited farmers who participated in the agroforestry project and I chatted with them in their houses. I offered to help them with some of their activities – such as helping the farmers load their bananas into trucks, or helping their wives do laundry in the house. Since I am an outsider myself, I cannot claim that I truly know how farmers behave when they are not interacting with outsiders. However, interacting with farmers on my own gave me an idea of how they interacted with New Forest’s sustainability discourse (if at all) when the staff and volunteers were not present.

Volunteers and staff alone – As mentioned earlier, I spent 25 days at the rainforest lodge, where I lived amongst the western staff and volunteers. I also accompanied them when they made trips to the village and they went on hikes and daytrips in the rainforest. During this time, I observed how outsiders interacted with the sustainability discourse in the absence of villagers.

Semi-structured interviews

My third source of data consists of semi-structured interviews with the volunteers, staff, and farmers. Hay (2010) defines semi-structured interviewing as “ordered but flexible questioning” (p. 110). As such, I had prepared an interview guide with open ended questions about participants’ experiences with the agroforestry project. I asked about their views and opinions regarding the project, the foundation’s vision, themselves/their role in the project, and the role of other participants (see Appendix A). However, I did not restrict myself to asking only the written questions. Instead, the questions in the guide were just conversation starters. The

most valuable information was obtained after I followed-up with more questions, asking participants to go more in-depth or to explain their answers¹⁰.

I considered a semi-structured interview to be most appropriate for my research because I asked participants to talk about a specific topic (the sustainability discourse and the agroforestry project). Yet participants provided additional unexpected relevant information. Occasionally, I used interviews to follow up on questions that arose during my observations, or to ask for clarification regarding my interpretation of participants' views and opinions. In Tembo's (2003) words, interviews "validate[d] observations and their meanings" (p. 63). The interview sessions also served as a way to report the research findings back to the project participants, and to answer their questions about my research, and farmers' and volunteers' questions about New Forest and their agroforestry project.

Interviews usually lasted between 30 minutes and one hour. I conducted two to four interviews with four staff members, 15 volunteers, and ten farmers, for a total of 29 interviewees. I did multiple interviews per person in order to follow up on their interview responses by asking them to clarify certain topics and to ensure that my interpretation was accurate. The interview questions were consistent across all three groups of participants in terms of content, but I had to adapt my interviewing style for each different group. The following paragraphs explain how the interviews were carried out with volunteers, staff, and farmers.

¹⁰ Often, participants were asked to rationalize their thoughts by explaining why they gave certain answers. For example, volunteers were asked why they decided to volunteer with the British foundation. After they answered (common answers included because it feels good to help others, because I wanted to see the rainforest, and because I wanted an adventure) I asked them why is helping others/visiting the rainforest/going on an adventure important to them. Interestingly, volunteers generally used critical thinking (most were university-educated) when explaining their answers, and said things like "well, really, volunteering is a very selfish thing to do because it is more of an experience for *us*. If we really wanted to help farmers, we would give them the money directly and not make the trip to Peru". I discuss participants' answers in the section on research findings, but this example shows the importance of asking follow-up questions. What could have been interpreted as an answer that supports the sustainability discourse is followed by a statement that rejects it.

Volunteers – I interviewed 15 volunteers in a private area in the rainforest lodge, in English. All the volunteers I met had an advanced level of English and had no problems in understanding and answering the questions. Volunteers seemed to be open and engaging, and seemed to answer the questions as best as they could. They seemed to feel comfortable talking about their feelings and experiences with the agroforestry project. When interviewing volunteers, the interviewer-interviewee dynamic was maintained because I was asking most of the questions while they listened attentively and tried to answer as thoroughly as they could. They did not ask many questions, even if I told them that they could interrupt at any time and ask their own questions, and at the end of each interview I told them they could ask questions. For volunteers, the interviews seemed to be like an intellectual exercise, where they reflected on issues and then gave their informed opinion. Many volunteers demonstrated critical thinking when answering the interview questions, in that they called into question the British foundation and its agroforestry project. Some of them told me that they tried to think of “something intelligent to say”, and others commented that my interview questions “makes them think”.

Staff – The interviews with the four staff members were conducted in both Spanish and English, depending on what they preferred. The interviews with the staff focused more on the technical aspects of the agroforestry project. Both western and local staff felt comfortable explaining the project in detail, and answering the questions I had regarding how the project was organized and implemented. They seemed to feel less comfortable answering questions regarding their personal experience during the “official” interviews, especially if they were recorded. However, they often expressed their feelings (such as telling me what bothered them about the project, the difficulties they faced, etc.) during casual conversations. The interviewer-interviewee

dynamic was maintained during interviews with the staff, as they listened attentively to my questions and tried to answer as best as they could. They also volunteered a lot of information they thought was important for me to know about the agroforestry project.

Farmers – In the village, interviews were conducted with farmers and their wives in ten of the twelve participating households, and with five farmers that signed up to participate in the agroforestry project, but had not yet undertaken the tree-planting activity. Interviews with farmers took place in their houses or in their fields, and were conducted in Spanish. I interviewed husbands and wives together when they both happened to be in their houses at the time of the interviews. When they were interviewed together, the wives usually let their husbands do most of the talking, as farming is traditionally a male occupation in the village. But, as I conducted two to four interviews per household, I also had the chance to interview the men and women separately. In general, they both shared the same perspectives about the agroforestry project and the New Forest foundation. Men, however, seemed to have a better understanding of how the agroforestry project worked in terms of logistics, as they were the ones conducting the farming practice. Women, on the other hand asked more questions about the New Forest foundation, volunteers, and the agroforestry project.

Interviews with farmers and their wives felt more like conversations because they were much less structured, and the interviewer-interviewee separation was often blurred. Most villagers took the lead during conversations and asked their own questions about me, my research, about the agroforestry project, about the volunteers, and about our countries. Interviews with the farmers were not recorded because the local staff worker told me that it would be inappropriate. He told me that villagers felt that outsiders “take information from Peru and bring

it back to their countries” and I believed that recording them would reinforce even more the inequalities between outsiders (including myself) and villagers.

Additional interviews with villagers who were not involved in the agroforestry project

In addition, interviews were conducted with some villagers who did not participate in the agroforestry project, but whose perspectives were useful in providing information about the local context in which the agroforestry project took place. In some cases, interviews were conducted with non-participants to cross-reference their perspectives with information obtained from interviews with project participants. These people included five farmers and their families who did not participate in the agroforestry project but practiced agroforestry on their own, seven women who participated in the foundation’s “biogarden” project (their other community development project where they built vegetable gardens for local families), one schoolteacher, one professor from the village’s Tourism Institute, the mayor, and a representative from the Ministry of Agriculture.

While interviewing villagers who were not participating in the agroforestry project helped me better understand the local context, this study is mainly concerned with the experiences of the farmers, staff and volunteers who were directly implementing the project in the village. As such, the research methods were designed to capture the experiences of the participating farmers, staff, and volunteers, and the research findings document their perspectives.

3.3.2 Data analysis

Data analysis took place both while I was in Peru and still collecting field data, and more intensively when I returned to Canada. While in Peru, I transcribed some of the interviews, and assessed them to see whether the questions I was asking were generating information that would provide information on how participants experienced the agroforestry project and how they engaged with New Forest's sustainability discourse. I was also looking for emerging themes in participants' responses, and for new directions where I might want to introduce new questions. I also kept a field notebook in which I described situations, events, activities, and experiences with the agroforestry project. I was mindful of emerging trends, changes in direction, and possible connections between different themes and issues.

Back in Canada, I followed a formal analysis strategy, based on Kitchin and Tate's (2000) strategy for analyzing qualitative data (which they adapted from Dey, 1993). This method consists of a three-step, iterative process: (i) description, (ii) classification, and (iii) connection. In the following paragraphs, I describe these three steps in more detail. Kitchin and Tate's approach is fully compatible with Gee's approach to discourse analysis, as I draw on his categories to classify the sustainability discourse and how people engage with it.

Description

According to Kitchin and Tate (2000), the first step in data analysis is to describe the information that was collected. For them, "description concerns the portrayal of data in a form that can be easily interpreted" (p. 231). Moreover, since "the description of qualitative data is usually more 'thick' in nature" (*Ibid.*, p. 233), it is useful to follow a systematic strategy for description that covers a range of things to describe. I described the data gathered in the

foundation's documents, interview transcription and notes, and observations recorded in the field notebook using Berg's (2009) guidelines for discourse analysis, which he adapted from the works of Gillian Rose (2001) and Gordon Waitt (2005). He proposes a seven-step strategy for the analysis of words and images (Table 3). The first two steps are guidelines for describing the data, and the five other steps are suggestions for what to describe.

Table 3: Berg's guidelines for discourse analysis

1	Suspending pre-existing categories
2	Absorbing oneself in the text
3	Coding themes
4	Identifying 'regimes of truth'
5	Identifying inconsistencies
6	Identifying absent presences
7	Identifying social contexts

(Adapted from Berg, 2009)

Classification

After describing the data, the next step is to classify it. According to Kitchin and Tate (2000), this means to "'break up' the data into constituent parts and then place them into similar categories". I classified the information into the categories that I created when designing my study. To identify how New Forest's sustainability discourse appears both in its vision and in practice, a corresponding separation between the macro and micro scales was made in the analysis.

Information on the sustainability discourse at the macro scale was categorized based on Paul Gee's three components of discourse: material realities, mental constructs and social

practices. In reality, however, there is considerable overlap between these three categories. In particular, it was difficult to divide the data into separate categories for the mental constructs and social practices. For this reason, this study groups together the mental constructs and social practices of the sustainability discourse, as one category.

At the micro scale, the purpose of this study is to identify how project participants reproduce, adapt, and/or resist the sustainability discourse in different contexts as they implement the agroforestry project in the village of Flora. As such, the field data is classified into four categories:

- Three groups of project participants: local farmers, project staff, and international volunteers.
- Three possibilities for how participants engage with the sustainability discourse: reproduce, adapt, and reject.
- Three components for the sustainability discourse: material realities, mental constructs, and social practices.
- Four situations: the logistics, organization, and planning of the agroforestry project; encounters between outsiders and villagers; farmers alone; and western staff and volunteers alone.

Connection

After the data has been classified, I identified the relationships, associations, and interactions between classes (Kitchin & Tate, 2000, p. 235). This was helpful for explaining *how* the discourse works, and *why* it works the way it does. I created a variety of different flow charts (Yin, 2003) to test alternative ways of interpreting how participants engage with New Forest's sustainability discourse, and how the sustainability discourse works at the macro and micro scales, and in-between.

First, I considered the relationship between the four local situations – that is, I compared how participants engaged with the sustainability discourse in each of the four different settings, and identified differences, commonalities, and relationships. This was useful for identifying the relationship between outsiders and villagers, the power relations between these different stakeholders, and differences in their behaviour. For example, connecting participants' behaviour to the material/socioeconomic contexts in the village helped explain why certain behaviour happens (e.g., why farmers participate in the agroforestry project despite their negative opinions about New Forest, and why they withhold their opinions in front of the staff and volunteers).

Next, I compared how the sustainability discourse in the village appeared in comparison to the discourse at the macro scale that formed part of New Forest's vision and project objectives. In each of the four situations, I identified the material realities, mental constructs, and social practices involved in the local agroforestry project. This "new" sustainability discourse was then compared to the official narrative in to see which component (material, mental, or social) is reproduced, adapted, and/or rejected by whom (farmers, staff, or volunteers). This was useful for identifying any gaps between vision and practice, and, if so, explaining how and why they happen.

Finally, I compared the situations in the case study to the concepts of cultural hybridity and orientalism, to see if they were useful for explaining the social dynamics between outsiders and villagers, and the relationship between the macro and micro scales. This was useful for understanding how the agroforestry project works locally, and for explaining how New Forest's sustainability discourse can be neocolonial at the macro scale but limited in the local village.

Chapter 4 – Research findings and analysis: Fostering “sustainability”, from the macro to the micro scale

In this chapter I present the research findings and their interpretation. I begin by outlining how New Forest’s sustainability discourse appears at the macro scale, in the project objectives and more generally in the West’s collective imagination. I then explain how local farmers, project staff, and international volunteers engage with this sustainability discourse (either by reproducing, adapting, or rejecting it) as they implement the agroforestry project in the village of Flora. This is followed by an analysis of how the sustainability discourse appears both in vision and in practice, and of the interactions between the macro and micro scales. But first, I briefly describe the New Forest foundation and its agroforestry project.

A brief description of the New Forest foundation and its agroforestry project in Flora

New Forest is a western-led environmental organization that is based in London, in the United Kingdom. The foundation has an office in Cusco for administrative duties, as well as a rainforest lodge in the Peruvian Amazon, located at about nine kilometers from the village of Flora (where the agroforestry project takes place). New Forest’s primary activities are ecotourism and biodiversity research, which take place in rainforest areas seeded by secondary forest owned by the foundation. It also conducts community projects in Flora, which the foundation sees as a way of “giving back” to the local community. The foundation has created partnerships with various universities and other research institutes, and with some travel agencies. As a result, there is a constant flow of international volunteers, students, researchers, and tourists who stay at the rainforest lodge for weeks at a time. Volunteers also help with New Forest’s scientific and community projects.

New Forest is owned and directed by a British/American man, who has invested his own money to establish New Forest and to help maintain it to this day. The foundation also receives funding from private institutions (such as the UK institution that is financing the agroforestry project), as well as international volunteers and tourists who pay to stay at the rainforest lodge.

The agroforestry project, which is also part of the larger carbon offsetting initiative in Europe, is one of two community initiatives, the other being a “biogarden” project where staff and volunteers set up vegetable gardens for families in the village in an attempt to combat malnutrition and complement household incomes. It carries out these activities from its rainforest lodge, which houses the project staff and international volunteers. For the agroforestry project, the staff and volunteers make trips to the village of Flora to plant tree seedlings in fields owned by local farmers, and to monitor existing agroforestry plots.

However, the practice of agroforestry existed in the village before New Forest’s involvement. According to a New Forest staff member, agroforestry and reforestation was heavily promoted in Flora by the Peruvian government in the 1990s. To this day, many farmers continue practicing agroforestry on their own, separately from New Forest’s agroforestry project – although not in such a structured and calculated manner.

At the time of the research, New Forests’ agroforestry and biogarden projects were the only western-led environmental project in Flora. However, New Forest staff and villagers revealed that many other environmental agencies have previously been involved in Flora, due to its proximity to the rainforest, which attracts a great deal of international attention. However, the staff and villagers said that these previous non-governmental organizations have failed to deliver benefits to local people, which gave environmental organizations in general a bad reputation in the area. New Forest seeks to differentiate itself from these previous environmental organizations

by providing an agroforestry project that brings real socioeconomic benefits to local farmers, while helping protect the environment. Indeed, the foundation ensures that its research and community projects are designed based on “building sustainability in the rainforest”, as indicated in their vision posted on their website:

OUR VISION

Building sustainability in the rainforest

Many people mistake sustainability as simply conservation of the rainforest, but true sustainability strives for economic, social and environmental continuity as a holistic effort. This is the ethos that drives what we do and why we exist (Clark, 2008).

It is this broader vision of “sustainability”, in conjunction with its carbon offsetting goals, which shapes how the agroforestry project is designed and carried out in practice. However, as the project is still new (it was established in 2008), it is yet to be seen whether New Forest’s project is successful with local farmers in the long term. The analysis that follows is based on this initial stage of the agroforestry project, but presents the implication for the project’s long-term success.

4.1 Identifying “structure”: The official sustainability discourse of the New Forest foundation

I now outline the material realities, mental constructs, and social practices of the macro-scale sustainability discourse, as it is presented in New Forest’s vision and mission as an organization committed to “building sustainability in the rainforest”. These form the structural conditions under which the agroforestry was designed, and influence how it is implemented locally.

4.1.1 Material realities of New Forest's sustainability discourse

At the macro scale, the agroforestry project is made possible through two main material and economic components: (i) the economic transactions involved in carbon offsetting; and (ii)

paper contracts signed by New Forest and local farmers, which bind them in an agreement to participate in the agroforestry project.

Economic transactions

Materially, the sustainability discourse is manifested through a series of transactions between four stakeholder groups. The key stakeholders are the institution in the United Kingdom who finances the project, the New Forest foundation – which includes the director, project planners, and administrative staff who manage the project from a distance, as well as the European and Peruvian staff charged with implementing the agroforestry project in the field – Peruvian farmers, and international volunteers who offer their help. New Forest's agroforestry project and its larger mission of fostering sustainability in the local village bring together several stakeholder groups, through a series of transactions. These material realities are represented in Figure 2, based on my own understanding of the carbon offsetting project.

Figure 2: The economic transactions of the sustainability discourse

To begin with, sustainability is achieved through carbon offsetting, a market-based mechanism involving transactions between the UK institution, the New Forest foundation, and local farmers.

The cost of setting up and monitoring agroforestry fields is largely funded by the carbon credits that are produced through the process of offsetting emissions. The funding institution in the UK has “committed to offset [their] emissions for three years” (Clark, 2009a, p. 6), offsetting 80 tonnes of carbon per year, and paying £22 per tonne directly to New Forest to do this. The New Forest foundation uses the money to “help fund the set-up, monitoring, and maintenance of the agroforestry plots” (Clark, 2009b, p. 1). Payments for carbon sequestration are not given to farmers directly. Instead, farmers receive economic benefits in the form of “development aid”, where they are given free banana plants and seedlings. The staff and volunteers help farmers set up agroforestry plots, and provide them with “a long term plan for sustainable land use” (*Ibid.*). The foundation is charged with the setup of agroforestry fields because it has the capacity to do so (in terms of planting a certain number of trees, monitoring the fields, and collecting data in order to ensure that a precise amount of carbon is sequestered), and it can comply with the regulations of carbon offsetting and be accountable to the British funding agents¹¹.

As for local farmers, their benefits include the free initial setup of an agroforestry field: they receive 600 banana plants, 190 tree seedlings (consisting of four different indigenous tree species, which are specified in Appendix B), and labour in the form of international volunteers. New Forest also claims that agroforestry can provide additional long-term economic benefits, including increased crop yields, and therefore better incomes from banana production. Moreover, under project regulations, farmers are allowed to cut down the softwood trees after 15 years and hardwood trees after 40 years, and sell the wood to earn additional income.

¹¹ Through the agroforestry project, New Forest is hoping to achieve “capacity building” and “empowerment” for local farmers, where eventually they could have more control over carbon offsetting. It is stated in the foundation’s documents that after the three-year contract with the UK institution, farmers could participate in programs such as UN-REDD+ if they wish. However, it is still unclear whether they will receive direct payments and if they will have more control over the project.

The agroforestry project is managed locally from the foundation's rainforest lodge in the Peruvian Amazon. This adds two stakeholder groups to the transaction system: the project staff that is hired by New Forest to implement agroforestry locally; and international volunteers who pay between \$2,099 to \$4,299 USD to visit the rainforest and to experience "conservation in action" by helping with the agroforestry project.

From a political economy perspective, the agroforestry project can be interpreted as a form of exploitation insofar as Europeans are using Peruvian resources to achieve their own interests and economic gains. To begin with, New Forest's community projects such as agroforestry and vegetable gardens are publicized to attract funding agencies, collaborators, and volunteers who pay significant sums of money to the foundation. The agroforestry project also benefits the volunteering agencies, who arrange for volunteers to stay at New Forest's rainforest lodge, and the research institutions, where professors, researchers and students engage in botanical research in New Forest's territory in the rainforest, or in social science research with its community projects. In short, New Forest's agroforestry project can be seen as an initiative that was created by outsiders, for outsiders, to suit their own particular purposes (Argyrou, 2005).

But most important, carbon offsetting does not address the main cause of climate change, the greenhouse gas emissions produced by people living in industrialized regions (Putz & Redford, 2009; Smith, 2007). In fact, offsetting carbon allows people in the West to continue their activities without having to directly suffer the consequences of climate change or to modify their behaviour (Bachram, 2004). Although it must be acknowledged that the British funding institution is also taking measures to reduce the carbon emissions it produces, these are relatively minor changes that do not alter their regular activities.

At the macro scale, New Forest's carbon offsetting strategy operates in a context of existing "uneven development" and socioeconomic inequalities between rich and poor countries (Gutiérrez 2012; Newell et al., 2012; Smith, 2007). As Gutiérrez (2012) puts it,

[t]he new market emissions reductions can only be conceived in the context of uneven development. Its logic and justification make sense solely in a situation of geographical and politico-economic difference, and the Kyoto Protocol's flexibility mechanisms are designed precisely to take advantage of this difference (p. 58)

These socioeconomic inequalities between rich and poor areas that are inherent in the global carbon economy are reflected in New Forest's carbon offsetting initiative, which reflects European priorities, and Peruvian resources are used to pursue outsiders' interests. In other words, the foundation's seeks to foster sustainability in the village of Flora using a market-based strategy that is exploitative to begin with, and that, according to many scholars, is also at the root of climate change and other environmental problems (Harvey, 2006; Putz & Redford 2009; Smith 2007). From a macro-economic perspective, it is likely that New Forest's agroforestry project, like previous carbon offsetting strategies, will perpetuate existing uneven development and reinforce inequalities between outsiders and villagers while simultaneously failing to achieve its environmental objectives. These problems and injustices within carbon offsetting, however, are not acknowledged by New Forest, who promotes the agroforestry project as a form of sustainability that will solve economic and environmental problems in Flora.

Paper contracts

New Forest's project objectives are reflected in the paper contracts that bind New Forest and participating farmers in the agroforestry agreement. These contracts are another material way through which the foundation seeks to "buil[d] sustainability in the rainforest". Farmers who

participate in the agroforestry initiative have to sign agreements to ensure they comply with the technical and environmental regulations of the project. The contracts provide an overview of New Forest's background and purpose and the agroforestry project's goals (including the goal of achieving sustainability in the village), and clearly outline the terms and conditions for participating in the agroforestry project, including the obligations of both the foundation and farmers.

The first clause concerns the “*ANTECEDENTES*” – background information and motives behind the agroforestry project. This informs the farmer that the British foundation is a not-for-profit civil association whose ultimate objective is to create an environmental education system in the region. In doing so, it seeks to address the limitations of the existing education system in the village and to promote sustainable development.

The second clause outlines the “*OBJETO DEL CONVENIO*” – the purpose of the agreement. This section states that the purpose of the agroforestry initiative is the mutual cooperation between the foundation and the beneficiary. The two parties must cooperate to achieve sustainability, which includes both economic and environmental benefits.

The third clause outlines “*LAS OBLIGACIONES DE LA COOPERANTE*” – the obligations of the foundation. New Forest provides to the beneficiary technical support, tree seedlings, banana plants, compost, transport, and other necessary material for developing and monitoring an agroforestry field.

The fourth clause outlines “*LAS OBLIGACIONES DEL BENEFICIARIO*” – the obligations of the beneficiary. These include providing one hectare of land for the setup of the agroforestry field (without ceding ownership), giving staff and volunteers access to the land, and participating in educational workshops given by the New Forest.

The fifth clause, “LA VIGILANCIA DEL CONVENIO” – the enforcement of the agreement – states that the contract is valid for three years.

The sixth clause is about “LA RETRIBUCIÓN ECONOMICA” – the economic benefits. Here, the farmer is informed that the benefits provided by the foundation are free.

Finally, the seventh clause, “LA DISOLUCION [*sic.*]” – the annulment – states that the agreement can be cancelled by either party with a 30-day notice.

The contracts help ensure farmers’ compliance to New Forest’s regulations, and that the foundation’s goal of “fostering sustainability” – which is understood by New Forest as offsetting carbon emissions while promoting environmental education in Flora – is being met. Together, the economic transactions between stakeholders and the paper contracts are part of the legal and economic “structure” in which New Forest’s agroforestry project takes place locally. They are material ways of making sure that “sustainability” is being fostered locally, and that carbon emissions are being offset in Europe.

Examining the material realities of the sustainability discourse alone, however, is not enough for determining whether the sustainability discourse is neocolonial. As stated previously, neocolonialism is defined as “modern attempts to perpetuate colonialism while at the same time talking about ‘freedom’” (Nkrumah, 1964, p. 41; cited in Watts, 2009, p. 360). As such, we also need to look at New Forest’s official sustainability narrative (which is presented in its documents and website) to see if planners are indeed denying or hiding the exploitative nature of carbon offsetting. I have already mentioned that New Forest promotes the agroforestry project as an unproblematic means of fostering sustainability in Flora, while ignoring the exploitative tendencies of the global carbon economy. However, in the following section I further unpack the mental constructs and social practices of New Forest’s sustainability discourse, and use the

concept of orientalism to explain how its practices and representations work in conjunction with its material realities to render the agroforestry project “neocolonial”.

4.1.2 Mental constructs and social practices of New Forest’s sustainability discourse

I divide the mental constructs and social practices of the sustainability discourse into three categories: (1) the framing of the environmental problems that agroforestry is supposed to help solve; (2) the ideal agroforestry project that appears in the foundation’s vision and goals (this is how the project *should* be implemented if everything goes according to plan); and (3) the mental constructs and social practices that are not explicitly acknowledged by New Forest, yet are essential to the functioning of the agroforestry project and are crucial components of the discourse.

1. Framing climate change and its solution

The general view that appears in the foundation’s documents is that environmental problems are caused by the interrelated problems of poverty, underdevelopment, and lack of education. Moreover, the region’s political and economic histories are said to have contributed to underdevelopment and to the lack of sustainable alternatives for local people to earning a living.

This is stated in a 2009 proposal for funding:

A further issue causing poverty and contributing to a lack of sustainable development in the region has been the boom and bust cycle of employment. Firstly in the rubber industry then timber, gold and now oil and gas exploration. A lack of long-term sustained investment and the negative consequences of these trends has resulted in a series of largely unskilled impoverished generations making little progress and destroying their natural resources and environments in the process (Clark, 2009c, p. 1).

As can be seen in this statement, the underlying logic is that local people are poor and have no choice but to destroy the rainforest in order to earn a living because they have no sustainable alternatives, and because they do not know any better. While not explicit, New Forest's representation of "the problem" portrays local farmers as disempowered, passive victims subject to the negative consequences of an increasingly globalized economy. This stereotyped representation of local villagers and their environment echoes neocolonial discourses that are common in international development and environmental initiatives (Bachram, 2004; Backstrand & Lovbrand, 2006), and that are typical of orientalism (Said, 1979; Spivak, 1994). In their funding proposal New Forest is speaking for local villagers in Flora, and representing local Peruvians and their environment in a way that justifies their agroforestry initiative and their role in Peru. Indeed, defining "the problem" as one of poverty, lack of development and economic opportunities, and lack of education makes "sustainability" – understood by New Forest as environmental, social, and economic well-being (Clark, 2009a) – the obvious solution.

For the agroforestry project, the broad goal of fostering sustainability is broken down into smaller objectives, divided into climate, socioeconomic, and environmental benefits. The following list of benefits appears in the foundation's documents that describe the agroforestry initiative:

Climate Benefits

- Carbon is captured and stored throughout the lifetime of each tree.
- Carbon is stored in wood products created from the harvested timber.
- Evaporation from trees cools the landscape – an important service at a time of rising temperatures.

Social & Economic Benefits

- New, sustainable sources of income for local farmers (carbon, crops and timber).
- Trees provide shade and nutrients for crops which promotes growth and increases yields.
- A long term plan for sustainable land use.

Ecosystem & Conservation Benefits

- Using five different native Amazonian tree species promotes biodiversity in plants and animals.
 - Agroforestry can decrease logging of natural forest by providing alternative and sustainable sources of timber.
 - Trees protect crops from wind damage.
 - Tree roots help to hold the soil together, preventing rainwater run-off which can pollute rivers and wash nutrients out of the soil.
- (Clark, 2009a)

In its representation of the problem and its solution, New Forest creates a binary division between the Europeans who have designed this carbon offsetting initiative and the local Peruvians who are recipients of aid in the form of agroforestry fields, and are supposedly given a way out of poverty by the foundation. Unlike local Peruvians, the Europeans in charge of the agroforestry project are represented as problem-solvers, whose mission is to teach farmers better management strategies to improve soil efficiency and provide them with a viable alternative to logging and traditional agriculture using crop rotation (to which the foundation refers as “slash-and-burn”, a term with negative connotations that highlights one brief stage in the agricultural cycle). At the same time, New Forest is educating villagers about sustainability, climate change, and carbon offsetting (Clark, 2009a).

The representation of local people as victims in need of economic aid and education and of New Forest as “problem-solvers” ties in with the material realities of the sustainability discourse, and is reflected in the economic arrangements between stakeholders. While western stakeholders (the UK foundation, New Forest, and international volunteers) participate in the carbon offsetting initiative through market trade, local farmers receive development aid from the foundation instead of being given direct cash payments. While there are practical reasons for this arrangement, giving farmers

economic benefits in the form of aid could also be seen as a way to ensure control over local people who cannot take care of themselves, or that cannot be trusted to do as they are told.

These binary representations of Europeans and the Peruvian “others” are at the root of ethnocentric assumptions within New Forest’s perceived solution to the problems of climate change. A key ethnocentric assumption – and one that has been identified and criticized by many scholars (Lansing, 2011; Bachram, 2004; Bumpus, 2012; Bumpus & Liverman, 2008) – in carbon offsetting initiative lies behind the principle of “additionality”. Additionality means that emissions are offset only if the trees planted through the agroforestry project and the carbon that is stored in them would not have happened under regular circumstances (in this case, without the involvement of the foundation). For New Forest’s agroforestry project, the British funding agents believe this is the case – that without their support, most farmers from the village would not be inclined to practice agroforestry due to the high cost of setting up an agroforestry field. It costs the foundation about \$1,000 USD to setup an agroforestry field in the village of Flora (Clark, 2009a). For this reason, they assume that

[a]groforestry is a costly practice for most local farmers in the region. [The] [f]oundation’s support and carbon finance provide the start-up funds needed to execute the project that wouldn’t otherwise be implemented under the business-as-usual scenario (slash and burn/shifting cultivation), demonstrating that the carbon captured and stored is ‘additional’ (Clark, 2009a, pp.3-4).

This reflects the ethnocentric assumption that local villagers cannot afford to plant trees and that Europeans’ carbon emissions can only be stored through western-led projects, when in fact, poor people in the Amazon have been planting trees for centuries (Evans, 1992). In the village of Flora, in particular, interviews with local staff and villagers

revealed that farmers have been practicing agroforestry for many years before New Forest's arrival, and that at the time of this research, many were practicing agroforestry separately from the foundation's agroforestry project. Farmers said that it does not cost them any money to grow their own trees and set up agroforestry fields (although it does cost them in terms of time and labour), which contradicts planners' claims that agroforestry is a costly practice.

In carbon offsetting initiatives that are designed in Europe, however, these local realities are not always recognized by planners, and are not integrated in the planning process. Instead, knowledge about the (Peruvian) "others" is created at a distance, based on western assumptions and stereotypes (Said, 1979), which are then projected onto local contexts (Carrier & West, 2009).

2. The ideal agroforestry project

Additional ethnocentric assumptions that are particular to New Forest's sustainability discourse are found in its representation of how the agroforestry project *should* be implemented in practice and in explaining how the project is meant achieve its stated goals. The ideal situation is one of the following: (i) farmers realize that agroforestry is more economically profitable than conventional agriculture, and other unsustainable activities such as logging and mining, and an increasing number of families willingly convert to agroforestry; (ii) through their collaboration with the New Forest, farmers develop an environmental consciousness; (iii) through the process of building agroforestry fields, trusting and harmonious relations are created between outsiders (planners, staff, volunteers) and villagers (farmers and their families); and finally, (iv) the agroforestry

project and the carbon offset initiative takes place on a level playing field between outsiders and villagers, and is a win-win situation for all stakeholders. The following paragraphs explain each of these four components in more detail.

Economic benefits – New Forest believes that the income generated by one single agroforestry field will make farmers want to switch over to agroforestry, thereby making their livelihoods more sustainable. Ideally, the agroforestry project will serve as an economic incentive that will “divert activity away from environmentally damaging sources of income” (Clark, 2009a, p. 1). This point is further explained in one of the foundation’s documents:

At present each farmer owns in average 15ha of land of which approximately 5ha are under active management. Every 3 to 5 years a new area is cleared and the crop cultivation is shifted. The plan is that each farmer will eventually stop cultivation in the other 4ha as the income from the agroforestry plot will equal or surpass the net profit of cultivating the whole area (*Ibid.*, p. 2).

As indicated in the quote, the promise of the agroforestry project lies in its potential to provide a viable alternative to unsustainable activities such as forest clearing for agriculture and logging.

Environmental consciousness – Ideally, however, the transition to sustainability would involve more than just economic incentives, but will also come from farmers’ own desire to live more sustainably. Indeed, one of New Forest’s goals is to raise local awareness about the value of the rainforest and sustainability by “building environmental consciousness” (*Ibid.*, p. 5). This is meant to be achieved by having farmers participate in workshops on the theory and practice of sustainability and environmental conservation. New Forest believes that with logging and conventional agriculture being “such significant driver[s] of deforestation [...] it is extremely important to educate the local community on the consequences of deforestation on climate change and consequently on their own daily lives and to empower them with an alternative long-

term sustainable development” (*Ibid.*, p. 4). Nowhere in the documents does it explain the fact that the burning of fossil fuels in industrialized countries is the primary source of anthropogenic carbon emissions into the atmosphere that are causing climate change.

In the ideal situation farmers would also gain environmental awareness simply by getting involved with the foundation and participating in its agroforestry project. As stated in one of the foundations’ documents,

[New Forest] believes that pilot projects such as this [the agroforestry project] offer much more than just carbon – it promotes sustainable development and behavior change, it offers the local people the opportunity to improve their livelihoods while saving natural ecosystems and biodiversity, consequently helping to mitigate climate change (*Ibid.*, p. 4).

Furthermore,

As local people feel part of the global community they develop a sense of responsibility, they become more educated on global issues such as climate change and the carbon markets. This enables them to develop the knowledge and skills they need to participate in decisions about the way they do things individually and collectively, both locally and globally. (*Ibid.*, p. 6)

In theory, farmers would learn about sustainability as they connect with outsiders, through their involvement in the agroforestry project, and through educational workshops conducted by New Forest. This would also require farmers to be receptive to the environmental views promoted by the foundation, and to be willing to cooperate with outsiders. This leads to the third component of the agroforestry project, the creation of harmonious relationships between these two groups.

Creating relationships between outsiders and villagers – Another component that is crucial to project success is the creation of trusting and harmonious relationships between outsiders and villagers. It may be specified in the contracts that farmers must collaborate with the foundation to fulfill project goals, but “building sustainability in the rainforest” involves more

than just a contractual agreement. It also involves building relationships between staff and volunteers of New Forest and local farmers at multiple levels. First there needs to be a strong relationship between farmers and project staff. Documents state that planners and staff need to “genuinely understand local needs and the connection with international realities” (Clark, 2009c, p. 1) in order to develop mutual understanding and collaboration with farmers.

In addition, New Forest states that “one of the keys to avoid the self-perpetuating cycle of poverty and poor resource management is to actively engage with local people and communities in finding real solutions” (Clark, 2008, p. 3). It is not clear how farmers are to be engaged – and this is an issue on which the foundation is still working – but the collaboration between farmers and New Forest would ideally involve *shared* goals and meanings. Ideally, fostering sustainability in Flora would be a goal shared by both outsiders and villagers. This shared goal would emerge from a shared understanding of the problem and of the meaning of sustainability, and would involve shared environmental views and values between farmers and the foundation. A look at the New Forest’s documents reveals that “the problem” is a combination of deforestation and environmental degradation, caused by unsustainable activities such as mining, logging, and conventional agriculture. These issues, in turn, are related to underdevelopment – including the lack of sustainable alternatives and the lack of (esp. environmental) education. For the agroforestry project to work according to plan, both outsiders (planners, staff, and volunteers) and villagers (farmers and local staff) must see the problem in a similar way. But while the documents indicate that it is important to understand local realities, without any attempt to learn from local people what their priorities are through focus groups, interviews or other approaches, it seems that New Forest is merely attempting to understand “local realities” from their own point of view.

The foundation also puts emphasis on developing relationships and achieving cultural exchange between local people and international volunteers. The volunteering program is aimed at people who are “looking to have an amazing experience, contribute, and learn” (Clark, 2011, p. 1). On the foundation’s website, connecting with local people, and sharing stories and experiences is advertised as part of the volunteer experience. Planners encourage volunteers to “talk about [their] culture and what inspires [them], providing an intercultural exchange and a wider global perspective” (*Ibid.*, p. 4). Furthermore, “volunteers are challenged to get involved physically, mentally and emotionally, as they connect with the people and realities that they will play a part in changing” (*Ibid.*, p. 1). Making a difference in local people’s lives is part of the agroforestry project’s appeal to potential volunteers. As stated on the foundation’s website: “most important is knowing that you leave behind a real positive impact on the lives of others” (*Ibid.*, p. 5).

Outsiders and villagers are on a level playing field – Finally, the agroforestry project is framed as a win-win situation for all stakeholders, providing benefits for local farmers, the New Forest foundation, volunteers, and the UK funding institution. New Forest claims that the agroforestry project is a demand-based program in which farmers participate voluntarily. In this context, all stakeholder groups are assumed to be on a level playing field that presupposes equality, transparency, and neutrality between all participants. Ideally, all parties see this agreement as fair and neutral. New Forest does not consider the cultural differences between westerners and villagers, who may not view carbon offsetting in the same way. Nor does the foundation consider farmers’ perceptions of westerners, where given villagers’ relative poverty, they may expect additional benefits from the foundation.

This assumption that outsiders and local villagers are on a level playing field in terms of how they participate in the agroforestry project seems to contradict New Forest's recognizing that local people are poor when they defined the socioeconomic and environmental problems that are supposed to be addressed by the agroforestry project. In that instance, poverty and underdevelopment in Flora was used to justify New Forest's involvement the Peruvian Amazon in order to foster sustainability in Flora. However, these same socioeconomic factors that were used to rationalize their involvement in Flora are not recognized by planners in their representation of how the agroforestry project is supposed to work locally. Likewise, recognizing that villagers are poor does not inspire planners to design a more egalitarian or participatory project, or to attempt to include local perspectives in their project design.

This selective interpretation of evidence is characteristic of orientalism, where contradictory evidence that could potentially challenge dominant discourses is instead re-interpreted to fit into western worldviews without challenging them (see Gregory, 2004, 2006, 2007). A selective memory is a core human characteristic as people are not always objective and rational thinkers (Argyrou, 1998) and, as such, selectivity alone is not what makes the agroforestry project neocolonial, or a form of orientalism. Rather, it is this bias in how New Forest represents local Peruvians in combination with its "positional superiority" (Said, 1979) – that is, its socioeconomic advantage and other privileges that New Forest enjoys simply by being European, and failing to recognize this – that makes the project exploitative.

This positional superiority gives New Forest the power to represent local villagers and their environment, as well as their role in Flora, with little resistance from Peruvians' part (see Said, 1979). In the foundation's documents and website, local Peruvians have no voice. They were not present at the time the staff and planners were writing documents, updating New

Forest's website, creating partnerships with other institution, or conducting project assessments. Nor did the New Forest staff and planners attempt to include local voices and perspectives in their representation of the agroforestry project, the local village, or environmental problems. As the carbon offsetting project was designed from a distance, the perspectives of local Peruvians were not acknowledged to begin with. As such, New Forest is able to speak for local people and to claim that it knows how to solve their local problems, and its biased representations then become naturalized and taken for granted in the agroforestry project.

These images are then re-presented to an audience in the West (Gregory, 2004a), consisting of funding agents, international volunteers, researchers and other collaborators, as well as people who visit the foundation's website. Some may disagree or may be critical of New Forest, but for others, these representations may not seem very unusual, as they are already deeply ingrained in the West's collective imaginary. This leads to the final component of the macro-scale sustainability discourse presented in this study – the underlying socioeconomic realities and assumptions about sustainability that are not explicitly acknowledged in New Forest's documents, but that are crucial components of the discourse.

3. The unacknowledged

Two key factors that are not acknowledged by the foundation are (i) the socioeconomic inequalities between outsiders and locals, and (ii) the foundation's definition of "sustainability".

The socioeconomic inequalities between outsiders and villagers – First, the power relations and socioeconomic inequalities between outsiders and locals, and the potential problems these may cause, are not acknowledged by New Forest. For example, planners and staff are aware that, in general, nongovernmental organizations have a bad reputation in the

village of Flora, and that there is some hostility towards outsiders and their environmental projects. However, New Forest's official sustainability narrative emphasizes that the agroforestry project is a voluntary agreement between all parties and, in doing so, makes it seem that this market relationship between outsiders and villagers is common-sense and uncomplicated. By framing the agroforestry problem as a demand-based and voluntary market transaction, stakeholders' different backgrounds, worldviews, and reasons for participating – which could create obstacles to achieving project goals – are not visible at this level. Planners do not seem to consider questions such as: Why would locals participate if they have a negative opinion of environmental organizations? Could farmers perform and feign compliance in order to receive economic benefits? Are western views of sustainability compatible with local perspectives? In reality, there are a host of problems that could arise and cause problems for the agroforestry project, but potential issues do not seem to be explicitly recognized and addressed by New Forest.

Instead, the contracts and the language used in New Forest's documents and website make it seem that all stakeholders are placed on a level playing field, where collaboration between outsiders and locals is seen as achievable and unproblematic. When everyone is seen as being equal, then the essential steps to the successful implementation of the agroforestry project – such as respecting contracts, working together, producing shared meanings about sustainability, working towards the same goals, and achieving cultural exchange between farmers and volunteers – are assumed to happen with relative ease. There is no concern that some people (usually outsiders) may benefit more than others (O'Brien & Leichenko, 2003), or that farmers may feign compliance and participate in the project without internalizing its environmental views, something that has been demonstrated to occur in similar projects

(Geoghegan, 2009; Mosse, 2004; Nelson & Jong 2003). Moreover, planners do not consider the potential problems caused by socioeconomic differences between outsiders and villagers, such as how relatively rich foreigners will be received by people living in a poor and marginalized village. They do not consider how the differences between rich outsiders and poor villagers would affect the creation of trusting relationships between the local farmers and members of the foundations. In fact, building relationships between farmers and the foundation does not seem to be a main focus for planners, and does not appear on the list of project goals. Yet, the relationship between outsiders and locals is essential to successful project implementation because all project's goals depend on the successful collaboration between these two groups. Given the socioeconomic differences, as well as linguistic, cultural, and other differences – there is significant potential for misunderstandings and clashes that are not acknowledged by New Forest.

A definition of sustainability – A second component of the sustainability discourse that is not explicitly acknowledged in the foundation's documents is the definition of "sustainability". There are only a few paragraphs that provide insights into the views of the foundation as to what sustainability actually means. But even if a precise definition of sustainability is absent from the foundation's documents, the notion of sustainability, or sustainable development, is present on a more abstract and pervasive level, in the West's collective imagination. As Elliott (2009) points out, "[t]he term sustainable development is a well-used one and is probably familiar to many within and beyond academia, certainly in the more developed parts of the world" (p. 117). "Sustainability" is a dominant concept in the West – a popular way of thinking about environmental problems and their solutions, and a legitimate environmental practice. It is so pervasive that project planners working for New Forest do not need to define what sustainability

means and to justify it as their main strategy for environmental protection. For example, planners manage to recruit volunteers and get money from funding agencies without having to explain in their proposals or on their website why sustainability is important; its importance is simply assumed. Materially, the concept of sustainability is used to put carbon offset strategies such as the agroforestry project in motion.

In conclusion, New Forest's sustainability discourse can be considered neocolonial because it obscures Europeans' socioeconomic advantages and other privileges in the agroforestry agreement, while giving the impression that carbon offsetting happens on a level playing field between outsiders and villagers. In particular, the concept of orientalism is useful for revealing some of the assumptions and stereotypes contained in New Forest's documents, and showing how Europeans maintain their cultural hegemony in the carbon offsetting initiative.

To see if New Forest's sustainability discourse has the same hegemonic power in the village of Flora, however, we need to look at how project participants respond to it. In the following section, I analyze how local participants reproduce, adapt, and/or reject the discourse in each of the four local situations. I assess whether orientalism manifests itself in the field, in research participant's views, opinions, and actions, or if alternatively, cultural hybridity occurs and challenges binary thinking and neocolonial mindsets.

4.2 Identifying “agency”: How local participants reproduce, adapt, and/or reject this sustainability discourse as they implement the agroforestry project

This section looks at how the material realities, mental constructs, and social practices of New Forest's sustainability discourse appear locally, as local farmers, project staff, and international volunteers implemented the agroforestry project in Flora. Materially, I show how

the macro-scale socioeconomic inequalities between rich and poor stakeholders manifest themselves in the village and create physical and social barriers between outsiders (western staff and volunteers) and villagers (local farmers and staff). I explain how these socioeconomic inequalities make participants uncomfortable and prevent them from collaborating, in a way that impedes New Forest's social and educational objectives from being implemented into practice. However, I argue that participants' knowledge of these socioeconomic inequalities is like the "elephant in the field". I show how each group strategically performs the images of "the level playing field" and "harmonious collaboration" promoted by New Forest to keep the agroforestry project running despite its limitations. Through their strategic participation, both outsiders and villagers participate in the project in way that corresponds to orientalism, and reinforce existing socioeconomic inequalities between rich and poor stakeholders while at the same time downplaying and ignoring them. This reinforces the neocolonial character of New Forest's sustainability discourse in the village of Flora.

4.2.1 Local manifestations of carbon neocolonialism: Exposing the material realities of New Forest's sustainability discourse in Flora

As explained in Chapter 2, the "material realities" of New Forest's sustainability discourse refer to the physical components of agroforestry (such as agroforestry fields, machetes and other tools for planting trees, etc.) but also to the socioeconomic contexts in which the agroforestry project is embedded and simultaneously helps reproduce. Below, I outline both sets of material realities and explain how they appear in the agroforestry project.

4.2.1.1 Socioeconomic contexts

In Flora, the agroforestry project departs from the images of equality and collaboration between stakeholders that are promoted by the official sustainability narrative. In practice, there are socioeconomic differences and power inequalities between project staff, volunteers, and local farmers that make it difficult for them to communicate and bond, and challenge the image of the level playing field that is presented in New Forest's documents. As I explained in section 4.1, the socioeconomic inequalities between rich and poor stakeholders are important material components of the agroforestry project, yet are unacknowledged in New Forest's official sustainability narrative.

Physical separation between western staff and volunteers and local farmers and staff

To begin with, outsiders and villagers are separated through physical distance. The agroforestry project is managed from the foundation's lodge, about nine kilometers from the local village where the project is implemented. The lodge is located in the rainforest instead of having a facility in the village because the foundation's primary activities and priorities are ecotourism (tourists and volunteers come visit and experience the rainforest) and conservation research (involving the study of rainforest plants and mammals). The agroforestry project, on the other hand, is part of the foundation's community projects, which planners see as their way of "giving back to the local community" (Clark, 2008). This setup creates physical distance between outsiders – western staff and volunteers staying at the lodge – and villagers – farmers and staff who live in Flora – which limits the interactions between them.

The physical distance between these two groups can be seen as a local manifestation of the global inequalities between rich and poor countries. For example, the rainforest lodge is

located on private land belonging to the British owner of the foundation. The British property in the rainforest is a protected area – used for ecotourism, research, and conservation – while the surrounding rainforest is being used by villagers for activities such as agriculture and logging, as a means of sustaining their livelihoods. According to the staff, this conservation space owned by “foreigners” creates tensions with local people. The staff explained that villagers see the conservation area as potential land that could be useful to them, especially since there is increasing competition over forest resources. As one staff member put it, “local people use the forest to make money... they come and cut the trees. When they see the big trees that grow on [New Forest’s] land, they want to come and cut them”. In fact, the foundation has had problems with local people encroaching onto its territory to do selective logging.

The spaces occupied by western staff and volunteers

Figure 3: New Forest’s rainforest lodge (Mersmann, 2010)

Another major socioeconomic difference is New Forest’s spacious and expensively built rainforest lodge in comparison to farmers’ houses in the village, which are small and functional. The lodge is composed of several elevated houses, made from high quality local materials. It has been designed by professionals and is solidly built. The lodge has several rooms and open spaces, including three bedroom areas, a large bath station with individual showers and flushing

toilets, a dining room, a common lounge, a separate volunteer lounge, a gazebo with hammocks, and ample open space to walk around. Volunteers each sleep in their own beds with a mosquito net and clean sheets, which are washed regularly by the Peruvian housekeeping staff.

At the edge of the clearing, there is a separate house with beds for local staff who are hired from the nearby villages. Their accommodation is similar to where westerners stay but, interestingly, this house does not appear on the map of the lodge and its surroundings that is displayed in the common area occupied by visitors. The European staff's sleeping area, however, is connected to the main lodges and appears on the map. The local staff take care of housekeeping, maintenance, cooking, and help with the technical aspects of scientific projects. The project coordinators and managers, on the other hand, are from European countries and from the city of Cusco.

The spaces occupied by local farmers and staff

Figure 4: Local residences in Flora (taken by author, September 10, 2011)

In contrast to the lodge, local farmers live in small houses measuring about six square meters in total. Their houses are small in comparison to western accommodations, containing a kitchen with space for a table, and a bedroom where the parents and children sleep. They also have a garden at the back of the house where they can grow vegetables and livestock. There is some variation in house styles, however. Farmers earn more money than most villagers, who do not own cropland, and often have bigger houses, or two smaller houses on the same lot. Other farmers own a house in the small village where the agroforestry project is being implemented and another in a bigger village nearby. The larger village has a better school for their children, and they may also run other businesses there, such as small shops. Nevertheless, there is still a clear contrast between the living conditions of staff and volunteers at the lodge and those of farmers in the village.

Visible socioeconomic differences between outsiders and villagers during encounters in Flora

The socioeconomic differences between outsiders and villagers are also visible during encounters, when the staff and volunteers travel to Flora to plant trees in farmers' agroforestry fields. At the time of the research volunteers spent about one night per week at a hostel in the village. During this time, they participated in New Forest's agroforestry and community garden projects, and also interacted with villagers as they walked around Flora and went into shops.

When villagers and outsiders come together in the same space, there are visible differences in wealth between the two groups. Volunteers wear more expensive clothes than villagers, and they carry backpacks, water bottles, and cameras. This creates a contrast with local farmers, who are very modestly dressed. Cameras, in particular, are a source of conflict because

some villagers do not like to be photographed, and do not like it when volunteers take photos in their village. They complain that volunteers “take information from Peru and bring everything back to their countries”.

The ability to travel is another socioeconomic difference between outsiders and villagers, where the mere presence of volunteers in Flora indicates that they spent a lot of money on their plane ticket to come to Peru. Most farmers, on the other hand, cannot afford to travel further than to neighbouring countries. For example, when a farmer found out that a plane ticket from Canada to Peru cost around \$1,000, he said that was about the same amount of money he makes in one year. Another issue with travelling is the difference in visitor restrictions between rich and poor countries. While North Americans and most Europeans do not need a visa for visiting Peru, Peruvians need to go through a tedious application process if they want to visit western countries. A group of people living in Flora said they had applied for visas to visit Canada and the United States, but that their applications were rejected. Likewise, villagers also complained that it is very hard for Peruvians to get permission to visit North America or Europe, especially for young single people. This created a contrast (in terms of personal power and privilege) with volunteers, most of whom were young single people, but had the ability to travel to Peru.

A third difference between villagers and outsiders is that the goals, values, and worldviews promoted by New Forest’s sustainability discourse are already familiar to most volunteers. Conceptually, the agroforestry project makes sense to volunteers, but is unfamiliar to most farmers who, according to the staff, need to be convinced about the merits of sustainability (as will be explained later in this chapter). In this context, it can be said that the agroforestry project is culturally appropriate for volunteers but not necessarily for local farmers.

In sum, the advantages of having more money than local Peruvians, having the permission to travel to Peru, and implementing a project that is culturally appropriate for them gave volunteers social, political, and economic power in the Amazonian village. This is the context in which encounters between volunteers and villagers took place.

4.2.1.2 Agroforestry fields

Figure 5: Volunteers working in an agroforestry field (taken by author, June 30, 2011)

While the socioeconomic differences between outsiders and villagers reinforce existing inequalities in the village in a way that departs from the image of equality and harmonious collaboration between stakeholders that is promoted in New Forest's documents, the material components of agroforestry are being implemented according to plan. These are the agroforestry

fields that are being created in Flora, the carbon offsets that are generated, and the economic transactions between stakeholders that are reinforced.

At the same time, the socioeconomic divisions between outsiders and villagers – which are unacknowledged yet crucial components of the sustainability discourse – are maintained during the setup of agroforestry fields in Flora, when farmers, staff, and volunteers come together to plant trees in farmers' banana fields. For example, volunteers and farmers usually work separately from each other and perform different tasks. The tasks performed by volunteers include: measuring distances and indicating where to plant the tree seedlings, brushing aside leaves and weeds and planting the tree seedlings using a machete, and labelling each tree for monitoring purposes. The tasks performed by the farmers are more difficult and require more skill. These include: the heavy-duty clearing of the field using a machete to chop dead trees, bushes, and weeds (this task is also more dangerous because there are more bullet ants and other insects in un-cleared areas of the field), and digging holes for planting banana plants. The divisions between farmers and volunteers are also maintained at lunchtime, where volunteers group together to eat their packed lunches prepared at the lodge. Farmers and their families eat separately from them (by the farmers' choice). Volunteers have healthier lunches – meat, rice or potatoes, and vegetables – while farmers usually snack on crackers. Other farmers do not bring a lunch, and keep working while the volunteers eat.

After their agroforestry plot has been set up, farmers are required to do some maintenance work, such as removing the weeds around the tree seedlings to enable them to grow. They keep in contact with the foundation, and local and western staff make regular visits to measure the trees to calculate the amount of carbon being offset, to replace any dead saplings with new seedlings, and to see if the farmers have any problems or questions.

During interviews and informal conversations, some farmers said that they may not respect the contracts because if they need the money they will cut the trees before the required 15 or 40 years have passed. Other farmers said they want to eventually cut their ties with New Forest and do agroforestry on their own. At the moment, however, it is hard to tell whether farmers will respect the contracts or not because the agroforestry project is still new and the trees have not grown to the point where they can be harvested. As such, the material components of New Forest's agroforestry project are reproduced in the short term but can potentially be rejected in the future.

4.2.2 “The elephant in the field”: How farmers, staff, and volunteers engage with New Forest's mental constructs and social practices

I now look at how local participants reproduce, adapt, and/or reject the material, mental, and social components of New Forest's sustainability discourse as they implement the agroforestry project in Flora. I look at four different situations. First, I look at the role of the project staff in setting the local boundaries of the discourse through the organization, logistics, and planning of the agroforestry project. Second, I look at how volunteers and local farmers and staff perform the discourse when they are interacting. Third, I outline local perspectives about the agroforestry project, New Forest, and its sustainability discourse. Fourth, I outline the perspectives of western volunteers and staff.

I find that the farmers, staff, and volunteers, are aware of the socioeconomic inequalities between them, and are in fact awkward and uncomfortable when they interact with each other. However, participants selectively reproduce and reject the mental and social components of the sustainability discourse in a way that reinforces existing socioeconomic divisions between outsiders and villagers, and ensures that the material components of the agroforestry project

(agroforestry fields, carbon offsets) are kept going. “The elephant in the field” refers to these socioeconomic differences that are recognized by participants, yet ignored by both villagers and outsiders instead of being explicitly addressed as a problem. This produces a project outcome that departs from the “ideal” agroforestry project that is presented in New Forest’s documents and undermines its hegemonic power locally. At the same time, participants do not challenge the project in any way or bring the issue of relative socioeconomic differences to the attention of planners. This makes New Forest’s sustainability discourse durable insofar as farmers benefit economically from the agroforestry project, but ineffective at achieving its environmental and educational goals related to fostering sustainability in Flora.

4.2.2.1 Working around the physical separation between outsiders and villagers: The organization, logistics, and planning of the agroforestry project

The staff are the ones in charge of managing the agroforestry project in the village, and must reconcile the interests of funding agents, farmers, and volunteers. In doing so, they play a great role in shaping the mental constructs and social practices of the sustainability discourse locally. This section explains how they reproduce and reject the mental and social components of the discourse during two specific situations: (i) when presenting the agroforestry project to volunteers; and (ii) when recruiting local farmers.

Presenting the agroforestry project to volunteers

When the volunteers arrive at New Forest’s lodge in the Amazon, they are introduced to the conservation and community development projects in which they will participate. Western staff members are the ones who present the agroforestry project to volunteers. They sit them down in the common living area in the lodge and give them information about the background

and the purpose of the project (they give less information about the specific details of tree-planting, which volunteers learn as they work in the fields). I witnessed three different presentations during the research period.

The staff begin by giving volunteers some background information about New Forest, informing them that the agroforestry project is financed by the institution in the United Kingdom, to offset its carbon emissions. They do not mention that local farmers have been practicing agroforestry before the foundation got involved. They go on explaining that the purpose of the project is to “teach farmers how to be sustainable”, and to show them “how to live in balance with the environment”. When giving background information about local people, the staff mention that villagers “are very poor and have very little education”. They say that “people cut the rainforest because they need to eat”. They then tell volunteers that the purpose of the agroforestry project is to offer farmers a sustainable alternative to logging and slash-and-burn agriculture, and to “show them that it is possible to live another way; to live sustainably”. They say that in the agroforestry project “we teach them how to manage one hectare of agroforestry”.

Thus far, we see that the staff are reproducing the sustainability discourse by performing it “in the appropriate way”, and in a way that is recognized by volunteers (Gee, 2011). Indeed, the western staff use the vocabulary, concepts, and logic models that appear in New Forest’s official sustainability narrative, and the presentations are well received by the volunteers, who seem to accept what the staff is telling them.

Then, the staff allude to a problem, hinting that it is not easy to promote the agroforestry project in the village. They tell volunteers that “some [farmers] want to try [participating], others are not convinced”. They say that “sustainability is a new idea in the area”, and that people there have a “different culture” and “different ways of doing agriculture”. To justify the project’s

importance, they use a mental construct that appears in New Forest's official sustainability narrative, which is the "important role that volunteers have to play" in the agroforestry project. They tell volunteers that their work will inspire villagers and will encourage them to get involved in agroforestry and with the foundation. One staff member said that "when locals see volunteers participating in the agroforestry project, they will think it must be important because people from Europe are doing it". He also added that volunteers will make a difference by interacting with villagers, conversing with them, and exchanging perspectives. Here, we see that the staff behaves in a way that corresponds to orientalism. They reinterpret villagers' lack of participation (which in reality is due to their disagreement with outsider involvement in Peru, which will be explained in subsequent sections) by attributing it to cultural differences. They represent local Peruvians as distrustful and uneducated "others" who need to be shown that agroforestry is good for them. At the same time, by not telling volunteers about local opposition to New Forest, the staff protect the sustainability discourse from any potential criticism from volunteers and contributes to sustaining the macro-scale discourse in New Forest's vision.

Recruiting local farmers

The local staff member recruits farmers and asks them to participate in the foundation's agroforestry project, as farmers would not respond well if they were approached by outsiders. In an informal interview, the local staff member – to which I will henceforth refer by the pseudonym "Arturo" – said that some farmers are skeptical, but he reassures them that he is not there to cheat them, and that they will not be cheated by the foundation either. Arturo seems to be trusted and admired by villagers. He is also a political figure – at the time of the research, he was the treasurer for the municipality – and has been involved in previous state-led and

international initiatives to help foster development in Flora. Arturo can be seen as an “altruistic leader” (Babajanian, 2007) who cares about villagers, and will do anything in his power to bring resources to the village and help improve their well-being.

To encourage farmers to participate in the agroforestry project, Arturo tells them about all the economic benefits they would receive from the foundation. These include free banana plants, free tree seedlings and labour for planting them (in the form of volunteers), technical support and advice, and the replacement of dead trees by new ones. At this stage, he does not emphasize the environmental goals of the agroforestry project (i.e., building sustainable livelihoods, teaching farmers how to manage their land more effectively, and offering them a viable alternative to logging and forest clearing). These environmental goals are not concealed from farmers (in fact, they are clearly outlined in the contracts); they are simply not emphasized during the initial recruitment. When I asked Arturo why he did not tell the farmers about New Forest’s goal to foster sustainability, he said that many villagers are against environmental organizations, and will not participate in the project unless they see that the organization offers them economic benefits. He said that they need to see that New Forest is here to help them and will not take advantage of them.

Similarly, when the staff from European countries and from the cities of Lima and Cusco interact with farmers during occasional visits to check on their agroforestry fields, they do not attempt to promote the environmental goals of the foundation. Instead, they make small-talk with farmers and their wives by asking them how they are, and talking about current local issues. During interviews and conversations with me, the staff said they know that international environmental organizations have a bad reputation in the area, and that many villagers are against outsider involvement in Peru. For this reason, they do not deliberately promote the

project as being a more effective way to farm, and do not tell farmers they are here to show them how to live sustainably, as this may provoke a negative reaction.

We see here that when they interact with farmers, the project staff reject the mental constructs and social practices of the sustainability discourse altogether, and instead behave in a way that respects local perspectives. But, ironically, rejecting the mental and social components of the discourse with farmers helps sustain them at the macro level because New Forest's dominant vision is not challenged. Similarly, avoiding the sustainability discourse with farmers limits the possibility of direct local resistance from their part. While farmers may feel resentful towards the foundation and its western environmental values on an internal, psychological level (as is discussed below) they are not actively resisting the discourse because it does not reach them to begin with. When the staff emphasize all the economic benefits offered by the foundation, they are offering farmers a deal they cannot refuse. As a farmer expressed in an interview, "how can one not participate¹²" when the foundation is simply offering them economic benefits?

Selectively reproducing the mental constructs and social practices of New Forest's sustainability discourse with volunteers but rejecting them with farmers can be seen as a pragmatic move from the staff's part, which makes the project easier for them to implement. In informal conversations, the staff explained that working for the foundation and trying to implement the agroforestry project is very stressful, as they are facing the pressure of meeting quotas for the number of farmers recruited and the number of fields that are created. Performing the discourse with volunteers and rejecting it with farmers can be seen as their way of reconciling the different views and interests of outsiders and villagers, and making the project run relatively smoothly in the short term. In doing so, they forego the educational objective and

¹² This is my translation of participants' quotes in Spanish.

optimize the economic and efficiency objectives of the project. This is a conscious trade-off, but one that is not communicated back to the planners in London. From the onset, the way in which the agroforestry project is implemented is producing a divide between vision and practice. The staff's selective performance of the sustainability discourse prevents the foundation from achieving its goals of building harmonious relationships between outsiders and villagers and creating shared meanings of sustainability. However, this also leaves the macro-scale sustainability narrative unchallenged, as the ideals of sustainability continue to exist in the foundation's ideals and in the West's collective imagination.

4.2.2.2 Encounters between outsiders and villagers: A source of awkwardness and discomfort

In addition to the organization, planning, and logistics of the agroforestry project, the sustainability discourse can also be examined in the interactions between outsiders and villagers during tree-planting activities in Flora. In this section, I focus on encounters between volunteers and villagers in two specific situations: 1) the tree-planting activities, when volunteers and farmers are in the same agroforestry field, and 2) when volunteers are having a conversation with Arturo, the local staff member about the agroforestry project. In particular, these events show how the socioeconomic inequalities between outsiders and villagers make both farmers and volunteers feel awkward and uncomfortable when interacting, which prevent them from implementing the agroforestry project as presented in New Forest's vision. However, both groups reproduce the image of the level playing field and of "cultural exchange" to relieve their discomfort, and to keep the project going despite its departure from New Forest's original goals.

1. *Encounters in the field*

After the project has been presented to volunteers and farmers have been recruited, the tree-planting activity takes place. The staff escort volunteers to the village, where they help plant trees in banana fields owned by local farmers. Arturo supervises the activity and gives instructions to farmers and volunteers. During the nine days of planting I witnessed, there were between 3 to 7 volunteers and one farmer, sometime with family members (wife, children, or other relative), or another local person hired to help clear the field. In four cases, farmers were absent and volunteers did the planting on their own.

Encounters between volunteers and local farmers are characterized by feelings of awkwardness and discomfort for both groups. In both cases, what made participants particularly uncomfortable were the socioeconomic inequalities between outsiders and villagers.

Farmers' source of discomfort

Local farmers generally felt uncomfortable with their socioeconomic position in relation to volunteers and other visitors, where they felt they were at a disadvantage. For example, in an informal conversation with me, the wife of a farmer mentioned that some people in the village are uncomfortable with outsiders, because they think foreigners have very high standards of living. She said that some villagers are uncomfortable approaching outsiders, talking to them, and inviting them in their house. She also said that some villagers enjoy speaking with volunteers and other western visitors and enjoy getting to know them but that they become uncomfortable when foreigners take pictures and other information from Peru, and then go back to their countries and never come back. Another farmers' wife told me that a lot of people in the village feel resentful towards outsiders because the Peruvian visitor laws are relaxed for them, and that

outsiders are allowed to travel everywhere and to come see how local people live. On the other hand, it is hard for Peruvians to travel to western countries, and local villagers know that they probably never will. It is these differences in terms of wealth and privilege between outsiders and themselves that made some farmers uncomfortable when interacting with volunteers.

In addition, interviews with local farmers revealed that nine of the ten farmers who were interviewed felt in some way resentful towards outsiders and disagreed with their promoting sustainability in Flora. However, they participated in the agroforestry project in spite of their negative feelings towards New Forest in order to receive economic benefits. This led to particularly uncomfortable encounters with outsiders, where farmers were keeping their opinions to themselves in order to ensure the smooth implementation of the agroforestry project.

Volunteers' source of discomfort

During interviews, all fifteen volunteers mentioned they felt awkward interacting with villagers, or simply visiting Flora. Ten volunteers said they felt uncomfortable and awkward when they were walking around in the village and when local people were looking at them. One volunteers said that she felt uncomfortable being seen as part of “a pack of gringos with expensive clothes and backpacks”. This awkwardness was also present in the agroforestry fields, during the tree-planting activity. In a group interview, six volunteers said they felt uncomfortable eating their healthy lunches in front of farmers. They had been told by the staff that malnutrition is a problem in the area, and they said they “feel bad” eating a healthy lunch when farmers only snacked on crackers or did not eat lunch at all. Thirteen volunteers said that villagers were distant towards them, and felt uncomfortable interacting and conversing with them.

In addition, volunteers did not feel entitled to promote sustainability and conservation locally, when they knew how difficult it was for farmers to earn their living. Throughout their stay at the rainforest lodge, the staff kept telling volunteers that it is important to conserve the rainforest, but that “local people need to eat”. As such, neither the staff nor the volunteers tried to promote “sustainability”, the environmental benefits of agroforestry, or to tell farmers that it is important to stop practicing conventional agriculture and that it is better to convert to agroforestry. In this sense, outsiders departed from New Forest’s official sustainability narrative, which give the impression that western participants will educate local farmers.

Uncomfortable encounters

These feelings of discomfort generally prevented volunteers and farmers from interacting at all. The main issue that prevented communication between the farmers and volunteers, however, was the language barrier, where most volunteers spoke very little Spanish while none of the farmers spoke English. However, eight volunteers mentioned in interviews that they would have normally interacted with local people had they not felt so uncomfortable. Four volunteers also mentioned that they had travelled to other countries where they did not speak the native language but said that residents were friendlier and more welcoming than the people in Flora. In addition, there were three volunteers who spoke Spanish, who said that they tried to speak with local villagers, but that they felt that farmers were cold and distant towards them. In one particular instance, when a group of volunteers was building a vegetable garden for a family in Flora, they said they heard the mother tell her children not to speak to foreigners or help them with the garden. This made the volunteers feel uncomfortable and unwanted in the village.

When they did interact, however, both volunteers and farmers drew on the images promoted by New Forest's sustainability discourse to downplay the socioeconomic inequalities between them, and to create the impression of cultural exchange between farmers and volunteers. When interacting with volunteers, some farmers and their wives fed the stereotype of the environmentally friendly local who is impressed by volunteers' work with the agroforestry project. They told volunteers and staff how grateful they were for receiving help from New Forest. They said that volunteers are doing a good job, and that it is admirable that they came all the way to Peru to help them. Some farmers also told volunteers that it is important to protect the rainforest, that they care about the environment, that it is important for them to have trees, and that they do not want to cut them.

Volunteers, on the other hand, generally fed the stereotype of the clueless and incompetent foreigner. For example, most volunteers did not take initiative during the tree-planting activity, they waited to be told what to do by the local staff, and they were very receptive to any help and feedback they received. Other groups of volunteers liked to tell stories and to comment on how local children could use machetes and other tools better than they could, and how children showed them the proper technique for planting trees. Although volunteers' lack of initiative could be influenced by the fact that staff did not always explain the project in detail before bringing them to the field, their overall behaviour still tended to be on the submissive side. Volunteers did not express their frustration (sometimes they became frustrated with the lack of information they received from the staff) and they did not demand more information from the local staff. In a group interview with six volunteers, they said that when speaking with farmers and to their wives, they smiled and, "always tr[ied] [to] be extra nice and polite". Volunteers also expressed interest in local practices, such as how to sharpen a machete. In the field, when

volunteers learned new information from farmers, they cheerfully replied “Ahh! How interesting!” and “Thank you very much!” In general, the communication between volunteers and farmers seemed superficial, and their reactions appeared to be exaggerated on both sides.

Volunteers’ openness and receptiveness to information provided by farmers can be seen as their attempt to achieve the type of learning and cultural exchange promoted by the sustainability discourse. Their submissive and overly friendly behaviour can be interpreted as attempts to diminish their social status in order to feel like they are “equal” to farmers. On the other hand, farmers helped reproduce the image of the level playing field and of harmonious, apolitical cultural exchange for volunteers by keeping their views to themselves, and making superficial conversation instead of expressing their opinions about the agroforestry project.

Stepping out of the sustainability discourse

Sometimes, however, farmers challenged the image of the level playing field promoted by the sustainability discourse by asking volunteers how much they paid for their plane ticket. Others asked volunteers where they were from, and commented on how people living in western countries have a lot of money and a better quality of life than Peruvians. Volunteers’ initial reaction to these comments was usually an expression of shock and discomfort on their faces, quickly followed by responses such as “Ohh no! We’re poor students. We don’t have a lot of money”, and “Ohh! But we have poor people in our countries too!” Some volunteers gave further explanations such as “I worked hard and saved all my money to be able to come here”. Farmers did not generally react to these responses. Instead, they remained silent or changed the subject. Later, during interviews, a group of farmers told me that “sure, volunteers may be poor students, but they must have *some* money if they can afford to come to Peru in the first place”. Here, we

see that volunteers' initial reaction is to deny farmers' claims about their respective socioeconomic differences between outsiders and villagers, which appear to make them very uncomfortable.

2. Conversation between volunteers and local staff member during a group interview

I witnessed a similar situation, where volunteers denied their socioeconomic advantages during a group interview with five volunteers and Arturo, the local staff member. I asked participants about their experiences with the agroforestry project, and the volunteers said they felt the agroforestry project is inefficient, that they do not work hard enough, and that they should spend more time in the village instead of the rainforest lodge. What follows is a section of the transcript, with Arturo's response to volunteers' concerns, followed by their respective reactions. I translated Arturo's response from Spanish to English, and I was interpreting what he was saying to volunteers at the time of the group interview.

Arturo: We [project staff and local farmers] understand that you really come from a different reality.

Ruxandra: He's saying that they understand that we come from a different reality.

Volunteers: mmm... [expression of confusion and disagreement]

Arturo: And we cannot demand a lot from you in terms of agroforestry work. We know that you are doing the job voluntarily, regarding what you give in terms of physical effort. We cannot ask you to do more. As such, we are very thankful, all the families, all the people with whom we work.

Ruxandra: He's saying that they can't expect too much from us because we're not used to doing that much work back home...

Volunteers: Ohhhhh! [expression of shock, followed by uncomfortable laughter]

Ruxandra: ...physical work. And that all the families are very grateful for the work we're doing.

[awkward silence]

(The staff member then changes the topic)

Arturo: We want this project to be sustainable, what we do here with New Forest.

Ruxandra: They want the project to be sustainable...

Here, Arturo drew attention to the socioeconomic inequalities by admitting that volunteers were given special treatment, and that farmers did not expect them to work as hard as Peruvians. Volunteers responded by becoming uncomfortable and then Arturo started talking about “sustainability”. As this conversation shows, not only did volunteers become uncomfortable when villagers remind them that they are richer and more privileged than local Peruvians, but they did not like to feel like they received special treatment from local people either; instead, they liked to feel that “everyone is equal”. In a similar manner, volunteers became uncomfortable when the Peruvian housekeeping staff at the rainforest lodge were too helpful and polite towards them, or when they were served better food than the local staff. On the contrary, they liked to feel that staff and visitors are equal, and they did not like to receive any special treatment. This echoes the image promoted by the New Forest’s, where it is written on their website that everyone at the lodge is like one close and happy family (Clark, 2008). Indeed, three volunteers said that what like about the lodge is that “everyone is equal”. All fifteen volunteers said they enjoyed helping with some of the chores, such as cooking and washing dishes. They also said they enjoyed interacting with the housekeeping staff in a familiar and friendly manner.

Furthermore, the local housekeeping staff at the rainforest lodge worked hard at creating an impression of equality to create a good rapport with volunteers. The older staff, in particular,

often approached the volunteers, joked with them, and let them do some of the work. The newer staff, on the other hand, were sometimes overly polite and helpful. For example, when they introduced themselves to volunteers the newer staff often told them that they were at their service and that volunteers could come see them if they needed anything. This made volunteers uncomfortable, and the staff quickly sensed this and modified their behaviour to give the impression of equality, which is more in line with the images of the level playing field and cultural exchange promoted by the official sustainability narrative.

The elephant in the field

A look at encounters between western and local participants reveals that the socioeconomic inequalities between these two groups are like the “elephant in the field”, making participants (especially volunteers) feel uncomfortable. However, instead of admitting their discomfort and addressing their issues, participants downplay and ignore the tensions and continue to implement the agroforestry project as if nothing were wrong. We also see that during encounters, the sustainability discourse provides a code of conduct that outsiders and villagers use to interact in ways that relieve tensions and discomfort. In particular, participants perform the images of the level playing field and of harmonious interactions between outsiders and local people (i.e. farmers acting like they are happy and impressed with volunteers’ efforts to help improve economic and environmental wellbeing, and outsiders denying the socioeconomic inequalities when farmers ask them questions about money).

“The elephant in the field” does not stop here, however. When they are on their own, both local and western participants can be critical of the agroforestry project and its sustainability discourse, and openly talk about the socioeconomic inequalities between rich and poor

stakeholders. However, their criticisms are not translated into action, due to their same socioeconomic positions of which they are critical, which act as structural barriers. This point is further explained in the following sections outlining local and outsider perspectives when they are alone.

4.2.2.3 Local perspectives: Performing New Forest's sustainability discourse to receive economic benefits

Informal interviews were conducted with farmers to see how they engage with the mental constructs and material realities of the agroforestry project. Their responses revealed some resentment and disagreement with New Forest and generally with outsider involvement in their village. However, even if they perceived the project as being “unfair” due to the big socioeconomic differences between outsiders and themselves, they still participated in the project to receive economic benefits.

Feelings, views, and opinions

In the village, there appeared to be strong local resentment and opposition to outsiders and to their environmental initiatives in Peru (including New Forest and its agroforestry project), even among the local participants in the project. Arturo was the first one to mention the local hostility towards outsiders when he commented that “there are many people against us, against New Forest” and that many people accuse him of being a “sell-out” because he works for outsiders. He also mentioned that local people do not like to see foreigners on their land. According to him, many farmers do not trust outsiders, and some believe that the trees planted by volunteers belong to outsiders. He said that other farmers believe that trees planted by outsiders are “bad” and do not want them on their land.

This information was consistent with farmers' responses during interviews and informal conversations. Despite participating in the agroforestry project, nine of the ten farmers appeared to be opposed to outsider involvement in Peru. The one farmer who did not mention any disagreement with the foundation, was a representative of the farmers' union in Flora, and interacted with outsiders regularly (for example, during workshops or consultations with members of NGOs or representatives from the Peruvian government). Some farmers said they were unhappy with people from New Forest coming into their village to promote environmental conservation when, in fact, foreigners have destroyed the forests in their own countries. At the same time, farmers were not opposed to environmental conservation *per se*, or to the practice of agroforestry. All ten households (including the farmers and their wives) said they care very much about the rainforest, that they are sad to see how it is being cleared or degraded through overuse, and that they are concerned about its future. Three farmers also said they were concerned about climate change, a topic which they learned about on the news, through radio and television.

However, farmers still seemed to be unhappy with outsiders coming into their village to promote sustainability and discourage logging and conventional agriculture, because they felt that foreigners did not understand them and were completely disconnected from their local realities. Two farmers said they were unhappy that New Forest's agroforestry project was managed by outsiders to begin with, and said that outsiders cannot understand what local people really need in the village.

The socioeconomic differences between outsiders and villagers are a source of discomfort

The big socioeconomic differences between local villagers and outsiders seemed to make farmers particularly uncomfortable interacting with outsiders, and helped shape their negative

attitudes towards the foundation and its agroforestry project. For example, two farmers and three farmers' wives mentioned that a main problem with nongovernmental organizations is that the help and support they offer is not enough. According to them, outsiders do not manage their funds properly and most of the money and resources do not reach local people. Instead, they said, most of it is used to pay the salaries of the administration management staff who work in offices in Cusco and Lima. Farmers also seemed to have this impression of New Forest, which they see as being similar to any other western-led organization.

In regards to the agroforestry project, three farmers said the foundation should do much more than simply provide trees. According to them, the foundation should not expect a single agroforestry plot to be enough for sustaining their livelihoods. For example, one farmer said that if New Forest wants them to truly be sustainable, they should also provide livestock and fish to help sustain their livelihoods. Another farmer said he would like to receive money from the foundation. Farmers' opinions echoed the attitude towards outsiders promoted by the mayor, who welcomes the support provided by nongovernmental organizations but thinks that outsiders should invest a lot more money and implement larger-scale projects that will help "develop" the village, not only little projects here and there that have very little impact. Similarly, Arturo said that if outsiders really want to help local people, they should invest in "basic services". According to him, if people do not have basic services such as electricity, food and water, health services, and education, they cannot work and will not be interested in agroforestry.

Another issue raised by farmers that relates to the power relations between outsiders and villagers is that the aid offered by western-led organizations is always conditional, and for outsiders' own benefit. For example, two farmers did not like the carbon offset motives behind the agroforestry project, saying that outsiders are taking advantage of resources in Peru to make

money, which they bring back to their countries. Another farmer felt that the British foundation, just like any other western-led organization, is trying to promote conservation – which is in their own interest – without understanding that farmers need to earn a living and are not able to conserve the rainforest. Another farmer said he thinks that volunteers feel guilty because in their countries all their forests have been destroyed, and so “they come to Peru and plant a tree to feel better”.

Participating for economic benefits

Despite their negative opinions of New Forest and of outsiders in general, these same farmers still participated in the agroforestry project. When I asked why they chose to participate, four of the ten farmers that were interviewed said it was because Arturo encouraged them to participate. However, all ten farmers said they participated because it is a form of support for their farming practice. They said they wanted to receive free tree seedlings, banana plants, and labour for planting them. In short, they are participating to receive economic benefits and not because they wish to “foster sustainability” in Flora, as promoted by New Forest. As such, they reject the mental constructs and social practices of the sustainability discourse when they are not interacting with outsiders.

The logic of sustainability

Farmers’ negative feelings towards outsider involvement in Peru reflect their views about western-led organizations in general, which they also projected onto New Forest and its agroforestry project. However, it was evident in the interviews that it was hard for farmers to disagree with the specific rationale behind the agroforestry project and with the logic behind

carbon offsetting and sustainability. Interviews with staff and local farmers revealed that when farmers read the contracts, or when they attended workshops organized by the foundation to explain the purpose of agroforestry, they did not challenge the information that was presented to them. During the research period, there were no workshops that were given, and there were no direct observations of farmers signing contracts, but a conversation with a local farmer was useful in revealing how some people may feel when outsiders explain the goals of carbon offset and sustainability to them.

When asked what he thinks of conservation and sustainability, this particular farmer expressed the typical frustrations with western-led environmental projects. He said that conservation is a problem for farmers because they need to make money somehow. He then said that there are very little opportunities in the village, so people resort to selective logging even though they do not make a lot of money from it. Also, he explained the money earned from logging is spent quickly because people have children who need to go to school and need clothes. Moreover, he said that most farmers do not do much logging, that the loggers are other people from outside the village who came to Flora to cut trees and then they left. He also said that for farming, most trees are left standing because only the bushes and other low vegetation are cleared. Yet outsiders expect farmers to plant trees. For this reason, he feels that outsiders do not understand farmers and make unreasonable demands of them.

The farmer then asked me about New Forest, and we talked about the purpose of the agroforestry project. I told him about the foundation's vision, as presented in their official narrative. I said the foundation's goal was to foster sustainability in the village through agroforestry, which offers both environmental and economic benefits, and that this project was meant to offer local farmers sustainable alternatives to logging and traditional agriculture. I also

told him that as the trees grow they capture carbon, help produce more oxygen, and help mitigate climate change (and consequently help prevent drought and flooding). To this, he replied that this had also been explained to him by the project staff, and said that “when they explain it this way, it is hard to disagree with them”. He then mentioned that environmental organizations generally do not give enough information to farmers about their projects (such as explaining their purpose, and what they expect from local people).

An important point here is local perceptions of fairness. Farmers’ responses indicate that they do not think the agroforestry project is the same neutral, win-win situation that is advertised by the foundation. Farmers believe that outsiders have a lot of money, and so they expect much more from them. In this context, agroforestry can make “logical sense” to farmers, yet they can still disagree with it based on the fact that it is conducted by outsiders in their village, a practice with which they disagree. This indicates that creating shared meanings of sustainability is not based on agreeing on the same facts and stories, but rather on the relationship between outsiders and villagers, which is currently characterized by deep inequalities in wealth and power and for this reason alienates farmers from New Forest and its agroforestry project.

4.2.2.4 Outsider perspectives: Using the sustainability discourse to rationalize the agroforestry project and their role in Peru

I now outline the outsider perspective, where I explain how western volunteers and staff engage with the mental constructs and social practices of New Forest’s sustainability discourse.

Feelings, views, and opinions

When western participants were asked how they felt about the agroforestry project, volunteers were more comfortable than the staff in sharing their feelings and opinions. The staff

were less comfortable giving their opinion directly. Instead, their answers consisted in explaining the agroforestry project and the behaviour of local farmers.

To begin with, volunteers became somewhat disillusioned with the agroforestry project, as their experiences in the field did not correspond to the “volunteer experience” to what was advertised on New Forest’s website and to their general idea of volunteering in Flora. All 15 volunteers that were interviewed said their experience working on the agroforestry project was not as they had expected it to be. Ten volunteers said they were surprised that the people living in Flora seemed cold and distant, and that farmers did not make more efforts to converse with them. Five of them said they had expected villagers to be more hospitable and to invite them into their house for a cup of coffee. They mentioned how in other African and Asian countries they had previously visited, the villagers there were much friendlier and more welcoming.

Another thing that surprised volunteers was that local people were not more involved in the community projects. For example, some farmers were absent from their fields during the tree-planting activity, and staff and volunteers were working on their own. This surprised most volunteers because they expected to be working alongside the farmers and to connect with them, as was advertised on New Forest’s website. Likewise, three volunteers were particularly surprised that the women who were participating in the community gardens project, the foundation’s other community initiative, were not getting more involved and helping them build the vegetable gardens. They found it strange that some women were staying in their houses, or that they were sitting outside and watching them work instead of approaching them and participating in the project. During a group interview, four volunteers compared the agroforestry and community gardens projects to having workers fix something in their houses or backyards, back in Europe. One volunteer said that his parents usually serve coffee to workers. Another

volunteer said that she could not imagine someone coming into her backyard in Britain and plant trees or building her a vegetable garden. She said that if the government or an organization sponsored a reforestation or community gardens project, the British families would simply receive the tools and supplies and do the work themselves, or at least help the workers. Two others, however, commented on how it must be strange for local farmers to have foreigners coming into their village and plant trees in their fields. Six volunteers also said that locals do not participate more because their local culture is different, and that maybe they are so used to having foreigners do things for them that they feel comfortable stepping back and letting volunteers do all the work. Most volunteers were not aware that there was local disagreement with outsider involvement in the Peruvian village, and that this may be a reason why locals did not participate more. In general, volunteers said they felt like villagers simply did not care about the agroforestry project and about visitors.

As for staff members, two of them said that farmers were not participating in the community projects because “they have a different culture”. They also said that “local people are lazy” and that they are not used to the European way of working. Here, the staff members were referring to farmers not working in the same *style* as Europeans, such as not respecting the work schedule for agroforestry. They did not necessarily mean that farmers do not work as hard.

Moreover, most volunteers became disillusioned with their role in the agroforestry project and its impact on farmers’ lives. When they saw that farmers were not very involved in the project, volunteers felt like their hard work had little influence locally. As one volunteer expressed, “Don’t they know how hard we’re working?” Contrary to what was advertised on New Forest’s website and to what the staff told them during the initial agroforestry presentation,

volunteers did not feel like they had any impact on the lives of local farmers and their families, and did not feel like the agroforestry project made a difference in terms of improving farmer's well-being or helping protect the rainforest. These comments can be seen as clear indications that volunteers' experiences in the field contradicted the images of harmonious collaboration and cultural exchange promoted by New Forest, thus creating a gap between vision and practice.

The socioeconomic inequalities as a source of discomfort

As seen in the tree-planting activity, volunteers felt uncomfortable when interacting with farmers and other villagers. Thirteen volunteers said that villagers were distant towards them, and felt uncomfortable conversing with them. They were especially uncomfortable with the farmers that were being more assertive and asking them questions about money (such as how much they paid for their plane ticket). On the other hand, volunteers said they enjoyed talking with the local staff member (who has a lot of experience interacting with outsiders), and with the farmers who did not ask them questions about money.

The staff did not mention feeling awkward themselves, but they said that volunteers misunderstood and judged outsiders simply because they were foreigners. Two staff members said that locals assume that everyone coming from western countries is rich, and that people in Flora were giving them a hard time because they were foreigners. According to them, this is a reason why some local store owners try to overcharge visitors – because they automatically assume they have money. Similarly, the staff also felt that villagers' perception of westerners as rich also undermined the agroforestry project. As one staff member put it, “you're damned if you do, damned if you don't”, meaning that locals will always criticize them and be unhappy with having outsiders involved in their village no matter how hard outsiders try to “do well”.

Critical thinking...

Another common practice amongst westerners was to reflect on their experiences in the agroforestry project during their time at the rainforest lodge, and to discuss them as a group. This was not a scheduled activity initiated by the staff. Rather, it occurred spontaneously, during conversations or when volunteers had specific questions they wanted to ask the staff. Volunteers were also reflexive during interviews with me, which consisted of scheduled time to reflect on their experiences with the agroforestry project. In these situations, two attitudes were most prevalent: both the staff and volunteers were critical of New Forest, and sympathetic towards local farmers.

When they discussed the agroforestry project, the staff and volunteers were generally critical of the foundation, of their roles as outsiders in Peru, and of carbon offset in general. For example, eight participants said they felt hypocritical about promoting sustainability in the village when they thought it is mainly people from industrialized regions that are responsible for deforestation and for climate change in general. Moreover, five volunteers said they felt like they were participating in the agroforestry project for selfish reasons because planting trees makes them feel good about *themselves*, more than anything. They said that if they really wanted to help the farmers, they would give them money directly and not make the trip to Peru. Westerners did not have a favourable opinion of carbon offsetting, either. Two staff members said that carbon offsetting is a money-making enterprise, and that carbon offsetting is misleading because such abstract calculations cannot be applied to real situations in Peru. Another volunteer said that “carbon offset is somewhat of a sham” and that the European stakeholders “should plant the trees in Peru without offsetting their emissions”, which would be more generous than seeking to benefit from the agroforestry project. To this, a staff member replied that “the whole system is

f***ing bulls**t” and that carbon offsetting itself is a money-making enterprise where “millions of dollars are at stake”.

Staff and volunteers also showed sympathy towards villagers. None of the western participants that were interviewed blamed them for practicing traditional agriculture, logging, or mining. They accepted that earning a living was farmers’ main priority, and did not expect farmers to give up their practices and start conserving the rainforest. Likewise, volunteers said they understood that feeding their families is farmers’ main priority and said they would behave the same way if they were in farmers’ shoes. They also understood that farmers participated in the agroforestry project for the economic benefits and less for the environmental benefits. In addition, volunteers believed that farmers were unaware of the negative impacts their activities had on the rainforest. As one volunteer put it:

It would be nice if more people were aware [of the effect of their activities on the rainforest], but you need the luxury of time. And often, you need to be in a different country. I mean we’ve got very luxurious lifestyles in comparison. We can sit down and talk about these things without, you know, worrying about starvation or poverty [...] I’d be in [the agroforestry project] for the money if it was me. Especially if I had family, definitely.

This statement reflects a common perspective about the agroforestry project amongst the staff and volunteers, where they believe it is important to conserve the rainforest, but recognize that villagers need to earn their living.

...but not critical enough?

Although outsiders’ critical perspectives may seem like they challenge the mental constructs of the hegemonic sustainability discourse – in particular the image of carbon offsetting as being an unproblematic strategy for mitigating climate change – the other constructs

of the sustainability discourse remain unchallenged. In particular, the logic behind sustainability as being a desirable and achievable goal, and the practice of outsider involvement in Peru to promote sustainability and environmental education remained unchallenged.

When reflecting on New Forest's carbon offsetting strategy as a whole, the staff and volunteers seemed to believe that even though the agroforestry project has limitations, it is better than not doing anything to help farmers and the environment. All 15 volunteers said that the project was fundamentally "a good thing" and that it was "a good idea in theory". This view was also shared by some of the staff, who said that the foundation's owner is a "very good person" because he invests his time and money into helping protect the rainforest. Moreover, they believed that even though the agroforestry project had limitations, it was still better than not doing anything. None of the staff and volunteers interviewed said that New Forest should stop promoting sustainability in the Peruvian Amazon. Instead, all the staff and volunteers said that it was important to continue trying to promote sustainability in the village, and that one should not give up on this goal. A group of five volunteers specified that New Forest "is doing its best to make a difference", and that "it is important to persevere and keep trying to design better projects". Another group of seven volunteers said that they hoped that the agroforestry project would produce some positive results in the future, and that it could eventually help promote sustainability in the village.

Here, we see the same kind of selective interpretation of evidence that is reflected in New Forest official sustainability narrative (which was explained in section 4.1.2 where I outlined the macro-scale discourse). Indeed, because being critical of the agroforestry project at certain times does not prevent westerners from being uncritical in other situations. It seems that critical

thinking takes place in very specific and isolated moments, such as when participants are responding to interview questions, or when they are thinking about the project from an “intellectual” perspective. In other instances, their perspectives are closer to orientalism because interpret the project in a way that sustains the mental constructs promoted by the sustainability discourse. For example, when volunteers compared their tree-planting work to having workers do a job for them back in Europe, the local farmers were placed on a level playing field with Europeans. In that moment, the volunteers forgot about the socioeconomic inequalities between local Peruvians and Europeans, and it did not occur to them that farmers may not be comfortable interacting with outsiders because the agroforestry project and sustainability was not their idea. Yet, in other instances, the same volunteers seemed to understand local perspectives when they said that it must be strange for local farmers to have western people coming into their village to implement their environmental projects. So how come westerners have these limiting beliefs, when in fact they we have seen that they “know better” and can in fact be quite critical of New Forest and its agroforestry project? According to Said (1979; 2005), it is possible that outsiders make these contradictory comments without even realizing, simply because they can. Because of their socioeconomic advantages (which include staying in the rainforest lodge, which is separate from local people), westerners are sheltered from local disagreements and opposition from local people. As such, their critical perspectives do not challenge the sustainability discourse, nor do they combine its mental constructs in a way that adapts both critical and sustainability perspectives; instead, the two standpoints simply coexist.

Another example of outsiders’ selective interpretation of evidence is how they rationalize their encounters with villagers during the tree planting activity. As they participate in the agroforestry project and come into contact with local people, the staff and volunteers come

across feelings and situations that contradict some of the worldviews promoted by the discourse. For example, while they are expected to promote sustainability in the village, staff and volunteers avoid talking about sustainability and environmental protection to local farmers when they are interacting with them. This is because they recognize that farmers are poor, and they do not feel entitled to promote their environmental values when they see that local people work hard to earn their living and that the concept of sustainability does not resonate with local perspectives. However, instead of questioning the objective of fostering sustainability in Flora, outsiders rationalize their experience by saying “at least we tried to make a difference”. The staff sometimes go even further and say that outsiders cannot implement the project as planned because Peruvian culture is different and that “things work differently in Flora”. By accepting the vision of the project despite its shortcomings, the contradictory views that could potentially challenge the discourse are reinterpreted in a way that fit into the sustainability discourse and sustain it instead. Once again, this is indicative of orientalist beliefs, where evidence from the agroforestry project is reinterpreted to fit into their own worldviews and rationales.

4.3 Summary and discussion: Assessing what happens in-between the macro and the local scales

At the macro scale, New Forest’s carbon offsetting initiative can be interpreted as a form of neocolonialism. As we have seen, the agroforestry project primarily serves western interests by allowing them to offset their carbon emissions without making any changes to their consumption patterns in Europe and, in fact, reinforces existing inequalities between European and Peruvian stakeholders. However, the project is represented as a win-win solution to climate

change, where Europeans' role is to educate local Peruvians and offer them a sustainable alternative to conventional agriculture.

Locally, however, New Forest's sustainability discourse is limited because it is only reproduced when outsiders are physically present in the village of Flora. Local farmers only reproduce its mental constructs in an ephemeral, superficial way when they are interacting with outsiders, and only reproduce its material realities if they are benefitting from it economically.

Table 4 summarizes when the sustainability discourse is reproduced and when it is rejected in the village.

Table 4: Summary of the sustainability discourse in practice

	(i) Local organization	(ii) Encounters	(iii) Farmers alone	(iv) Outsiders alone
Material realities and socio-economic contexts	REPRODUCED	REPRODUCED	<ul style="list-style-type: none"> • REPRODUCED in the short-term • possibly REJECTED in the future 	REPRODUCED
Mental constructs and social practices	<ul style="list-style-type: none"> • REPRODUCED with volunteers • REJECTED with farmers 	REPRODUCED	REJECTED	REPRODUCED in spite of being critical

As we can see in the table, only *part* of the discourse – its material realities – is reproduced in all four situations (and even then, they can potentially be rejected in the future). The mental constructs and social practices that are rejected when the staff is recruiting local farmers and when farmers are not reported back to planners, and as such, do not challenge the dominant sustainability narrative. But even if the environmental values of the discourse are not implemented locally (despite the fact that trees are being planted and agroforestry fields are being created), they continue to exist in the project's vision because New Forest is not challenged and neither is the concept of sustainability.

But the fact that New Forest's sustainability discourse it is limited locally does not change its neocolonial character. In fact, neocolonialism is reproduced through "the elephant in the field". As explained in the previous sections, participants' awareness of the socioeconomic inequalities and injustices within the agroforestry project is like "the elephant in the field" –all participants are aware of these issues, yet they are ignored by both villagers and outsiders instead of being explicitly recognized and addressed as a problem. Instead, the sustainability discourse, is performed by both outsiders and villagers indirectly, where both groups attempt to downplay the socioeconomic inequalities between them by performing the images of the level playing field and of working together to benefit both the environment and local people.

4.3.1 Revisiting the theoretical framework

I now revisit the five components of the theoretical framework, namely Gee's interpretation of "discourse", along with structuration theory, performativity theory, orientalism, and cultural hybridity. I explain how they have contributed to understanding how New Forest's sustainability discourse works within the New Forest foundation and its agroforestry project, and for understanding the social dynamics between western and local participants, as well as between neocolonialism and its local resistance.

Discourse, structure/agency, and performance

As shown in Table 4, using Gee's definition of "discourse" (as a set of material realities, mental constructs, and social practices) is useful for understanding *which part* of New Forest's carbon offsetting initiative are reproduced, adapted, and/or rejected locally. This study finds that the material realities (including the socioeconomic inequalities) are reproduced in all four local

situations, making the agroforestry project durable yet ineffective at fulfilling its environmental objectives and promoting sustainability in Flora. Furthermore, the situations where participants reproduce and reject the mental and social components of the discourse correspond to the process of orientalism, showing that the discourse is only performed when outsiders are present.

At this point, it is useful to revisit Figure 1, representing how the sustainability discourse works at the macro and micro scales:

In concordance with structuration theory, we see that the macro-scale sustainability discourse is acting as a “structure” that influences participant’s local behaviour. In particular, New Forest’s official sustainability narrative serves as a “cultural repertoire” (Said, 1979; Gregory, 2004) that staff, volunteers, and farmers use when interacting, to downplay their respective socioeconomic differences and create the impression of a “level playing field” and of “harmonious collaboration”.

Nevertheless, outsiders and villagers perform the sustainability discourse in different ways – while westerners internalise (according to Butler’s and Foucault’s understanding of discourse), villagers feign compliance and perform the sustainability discourse in the theatrical sense (according to Goffman’s understanding). This is because they are poor and openly contesting New Forest and its agroforestry project is not in their best interests. In turn, participants’ strategic performance of the sustainability discourse helps sustain the official sustainability narrative at the macro scale. Overall, the effect of participants’ ignoring “the elephant in the field” reinforces the socioeconomic inequalities between outsiders and villagers, and perpetuates neocolonialism in the carbon offsetting initiative.

A discourse that is not subject to hybridization

As the research shows, the sustainability discourse is either reproduced or rejected by local participants, without being adapted or combined with other discourses. Cultural hybridity, understood as a mix between two or more different discourses (Canclini, 2005), does not happen within the agroforestry project. The western conception of sustainability is only performed and carried out when outsiders are involved – the local people do not adapt or appropriate its material realities, mental constructs, or social practices. As such, no hybrid understanding of the concept

of sustainability – based on both western narratives and local priorities – emerges. Similarly, western participants perform the sustainability discourse in some situations, but ignore and even criticize the implementation of sustainability in others, without combining both sustainability and critical perspectives. Rather, participants move in-and-out of the discourse, without changing it in any way.

In the agroforestry project, the sustainability discourse is not adapted or changed, in great part because of local farmers' poverty; along with their perception of their own socioeconomic position in relation to outsiders. Theorists on cultural hybridity state that conflicts between different "cultures" are avoided through cultural hybridity, which overcomes the "us-versus-them" dualism (Canclini, 2005; Pieterse, 2009). Within the agroforestry project, however, there is opposition and clear cultural divides between outsiders and villagers, but they are not in direct conflict or confrontation. Both outsiders and villagers participate in an agroforestry project and seek to avoid conflict despite their disagreements, but this is not due to cultural hybridity. Instead, their complicit participation in a project that they believe is less than ideal can be attributed to their respective socioeconomic positions. This point is further explained in the following sections.

Sustainability as an orientalist discourse

Orientalism, on the other hand, is useful for understanding how project participants reproduce the sustainability discourse and neocolonialism while simultaneously undermining it locally. In this study, orientalism is understood as a hegemonic discourse that is produced through the combination of westerners' stereotyped beliefs about the other in combination with their positional superiority in terms of economic advantage and power. For this reason, outsiders

are unable to understand local perspectives, or to see the potential problems within the agroforestry project.

Nevertheless, local people also participate in producing orientalism by keeping outsiders isolated from their local realities. They do this by keeping their views to themselves and by not telling western staff and volunteers what they really think of the project, and by not contradicting volunteers when they deny the socioeconomic differences between farmers and themselves. Farmers keep their views to themselves because of their socioeconomic position in relation to the foundation and to outsiders. Because they are poor, it is more advantageous for them not to challenge the project in order to receive its economic benefits. This is the farmers' way of benefiting from the agroforestry project and managing outsiders in a context of socioeconomic inequality.

As such, this orientalist relationship, while it stems from a much broader history and global context, is co-produced by *both* outsiders and villagers in Flora. This mutual participation in the process of orientalism is summarized in figure 6:

Figure 6: An orientalist relationship between outsiders and villagers

Volunteers' positional superiority, their stereotyped beliefs about the other, and local people's feigned compliance keep volunteers in a sheltered position. On one level, westerners do not always see evidence that contradicts their belief system to begin with (Said, 2005). In Figure 6, this is represented by the arrow in "outsiders' social reality" that does not go past the dotted line, into "villagers' social reality" but instead bounces back into outsiders' space. As we have seen, the staff and volunteers are aware of problems such as the unequal power relations, and they can also sense that something is "wrong" when they interact with farmers, but they are not necessarily able to perceive the severity of these problems in the field. For example, what volunteers see in the field is that everyone is participating in the agroforestry project, planting trees, and that sometimes farmers seem somewhat cold towards them – but that is not enough to make them challenge the project or question their beliefs about sustainability as a western mission. Because farmers feign compliance and perform the sustainability discourse in front of outsiders, volunteers are not always able to see any concrete evidence of how their presence in the village may be a problem for local people.

On another level, the evidence that *does* contradict outsiders' worldviews is re-interpreted (Gregory, 1999; 2000) to fit into the sustainability discourse. This is represented in Figure 6 by the arrow that crosses the line into social reality into villagers' reality, yet bounces back into outsiders' social reality as local situations are interpreted according to western worldviews. For example, when farmers mentioned that westerners are richer and have a higher quality of life than local Peruvians, volunteers denied farmers' claims by saying they are not *that* rich. Another example is the selective interpretation of evidence when western staff and volunteers recognize the project's limitations but attribute them to cultural differences, or say that it is still better than not doing anything to "save the environment". This is indicative of hegemonic beliefs about the

Peruvian others, which outsiders use to blame local people for problems and rationalize the agroforestry project and their position within it.

Through their silence and feigned compliance to New Forest's sustainability discourse, villagers help keep outsiders into their own "cultural bubble". Because they are poor, it is not advantageous for farmers to share their local perspectives with project staff and volunteers. Instead, they "benefit" from this orientalist relationship by receiving economic benefits from New Forest. This is represented in Figure 6 by the straight arrows, symbolizing villagers that are aware of outsiders' worldviews and help reinforce western beliefs through their performance.

In sum, the process of orientalism in the agroforestry case study involves (i) outsiders' socioeconomic advantage; in combination with (ii) their use of the sustainability discourse as a repertoire to interpret and re-interpret their experience within the agroforestry project, and to "other" local farmers; and (iii) local people's silence, feigned compliance, and lack of direct resistance to outsiders and their sustainability discourse, due to their socioeconomic disadvantage. As such, the process of orientalism is useful for understanding how "the elephant in the field" emerges, and how the sustainability discourse can be neocolonial and exploitative, yet limited locally (insofar as westerners are present in the village).

The next chapter discusses the significance of these research findings and on what can be done (if anything) to disrupt the neocolonial tendencies of New Forest's agroforestry project and its sustainability discourse.

Chapter 5 – Significance of the research, application of the findings, and concluding remarks

In this section, I outline the contribution of this study to current debates in human geography centered around western-led environmental projects in developing countries. Next I apply the research findings to New Forest's agroforestry project. I explain how the theoretical framework provides insights into how to solve problems within agroforestry projects, and make suggestions about what can be done to improve the likelihood of project success.

5.1 Significance of the research within current debates in human geography

Political economists were right all along – carbon offsetting initiatives, as exemplified through this agroforestry case study, can be considered neocolonial. Indeed, western-led environmental projects have hegemonic, orientalist discourses, through which they create their own vision of the world (Carrier & West, 2009) and maintain the “upper hand” (Said, 1979) in their dealings with local people. But at the same time, the agroforestry project cannot simply be reduced to a matter of neocolonialism in the deliberate sense as implied by the political economy perspective. It cannot be said that planners have a hidden agenda and are purposefully trying to establish their political and economic control over developing regions and their resources. As this study has shown, planners and western participants seem to genuinely want to help mitigate against climate change and to help improve the well-being of local people, but still fall in the orientalist trap where they seek to implement the agroforestry project on their own terms, have a poor understanding of local perspectives, and cannot connect with local people.

As such, this study has shown how orientalism appears on the ground, in a current carbon offsetting initiative. This is a significant research contribution for two main reasons. First, while orientalism has traditionally been used to examine western constructions of “the other” in texts

and images, this study has looked at how orientalism appears on the ground, in a current agroforestry initiative where “the West” and “the Other” come face-to-face. Second, this study has applied the concept of orientalism to carbon offsetting, a relatively new phenomenon. That orientalism can explain the relationship between outsiders and villagers in the agroforestry project shows that while the discourse has changed (for example, planners are not openly racist and instead emphasize collaboration with local people), the underlying colonial practices and social mechanisms persist (see Gregory’s 2004 works on the “colonial present”).

Finally, this case study has uncovered a surprising research finding, which is “the elephant in the field”. In this study, participants are, in their own way, aware of the injustice and exploitation in carbon offsetting initiatives, and in the agroforestry project in particular – the same issues that we seek to “expose” as critical scholars. The agroforestry project is an example of strategic participation, uncomfortable and superficial interactions, and complicit involvement in neocolonialism, which produces outcomes that are less than ideal for both outsiders and villagers. This finding is different from other case studies, which show power struggles between planners and villagers, and negotiation over environmental meanings (see Peters, 2000; Carrier & West, 2009; and Sundberg, 2006, respectively).

5.2 Application of the research for the agroforestry project and for carbon offsetting initiatives in general

I now seek to apply the research findings by making recommendations that planners could use to improve their agroforestry project by challenging the orientalist relationship between western and local participants. In short, if the neocolonial character of New Forest’s carbon offsetting is to change, planners and participants need to start taking the “elephant in the field” seriously, and reduce the socioeconomic inequalities between outsiders and farmers, and

between New Forest and local villagers in general. This is a challenging task, however, as carbon offsetting may be inherently neocolonial (Bachram, 2004; Bumpus & Liverman, 2008).

Is New Forest caught in a structural trap?

When using critical theory to look at the agroforestry project, the foundation becomes caught in a “structural trap”, where the project is unsuccessful simply because it is conducted by outsiders. Because of outsiders’ *relative position* (i.e. socioeconomic advantages – or positional superiority, as Said put it) in relation to villagers, anything they do can be considered as exploitative or neocolonial (not to say that it is not). This structural trap manifests itself at both micro and macro scales in the agroforestry project.

Locally, this notion of being “trapped” is felt by some staff members, who feel like they are stuck doing a job that is destined to be unsuccessful and unpopular with local farmers. As we have seen, the staff feel like they are “damned if they do, damned if they don’t” because local farmers will be unhappy with whatever they do as long as the agroforestry project is conducted by outsiders. Similarly, the staff also feel like the agroforestry project is part of a carbon offsetting strategy that is unequal to begin with, and that they are trapped in “the system” of economic inequality between rich and poor countries.

More generally, outsiders’ positional superiority puts New Forest in a difficult position because it has good intentions, and it is promoting a project that seeks to bring economic and environmental well-being in the Amazonian community. But at the same time, the agroforestry project can be considered to be exploitative because farmers need to be in a position of relative poverty for the project to be successful; otherwise they would not necessarily participate given their strong resentment against outsiders. If outsiders and villagers were more equal in terms of

wealth and power, perhaps local farmers would be more open to collaborating with New Forest. The view that New Forest is exploitative is shared by local farmers, who feel that the agroforestry project, just like all the projects led by outsiders in their community, is inherently unfair. As such, they do not seem to resent the practice of agroforestry *per se*, but they expressed strong disagreement with the agroforestry project that is carried out by the British foundation in their village.

This suggests the agroforestry project is part of a carbon offsetting initiative that is neocolonial to begin with, and anything that New Forest does can be interpreted as exploitative as long as it is part of the larger system of inequality. Ironically, it is this very exploitative nature that makes the project unlikely to succeed in the long term, since the same socioeconomic inequalities between outsiders and villagers that make the project durable also appear to be the main obstacles to project success.

In this context, the most “ethical” solution is for New Forest to stop its carbon offsetting project, and to leave the Amazon and to promote sustainability in Europe, or alternatively, to offer support for initiatives that are led by villagers in themselves¹³. For example, New Forest could help provide basic services for villagers in Flora, as Arturo believes, or support initiatives led by the mayor, community leaders, women’s associations, or other groups. However, local initiatives may not always be in line with New Forest’s mission of “building sustainability in the rainforest”. This brings us back to the original problem that international environmental or development initiatives are flawed from their very premise, and that mitigating climate change requires systemic changes that would challenge neocolonial relations between rich and poor

¹³ This last suggestion is based on scholars’ recommendation that rich countries should support development projects led by people in developing countries themselves (see Clare Short, Draft speech for the Johannesburg summit on Sustainable Development, July 2002; cited in Mosse, 2004; p. 640).

stakeholders. Another issue is that New Forest planners would be unlikely to implement such “drastic” recommendations, which would challenge their *raison d’être* in the Peruvian Amazon.

Does structuration theory offer a way out?

From another perspective, structuration theory suggests that the macro-scale inequalities in power and wealth are constantly being reproduced in the field, through participants’ repeated (or avoided) interactions and activities (Dyck and Kearns, 2005; Lippuner & Werlen, 2009). This implies the reverse is also true: if people behave differently, the macro-scale discourse can be challenged – even if the results are only felt in the village, at a very small scale. For the agroforestry project, addressing the relationship between outsiders and villagers and seeking to level the power balance between the two groups could potentially make the project more egalitarian and also more successful in the village of Flora.

It is with structuration theory in mind that I make some recommendation that planners could use to address “the elephant in the field” and seek to render the agroforestry project less exploitative locally. However, it must be recognized that these recommendations are necessarily limited, and that, if planners were to implement them, they would not necessarily challenge neocolonial relations at a larger scale, not the orientalist relationship between outsiders and villagers.

5.3 Providing recommendations to address current problems with the agroforestry project

The first step in addressing “the elephant in the field” is to include the socioeconomic inequalities between outsiders and villagers in the planning process, instead of ignoring them. For example, it is not enough to recognize that local farmers are poor, but planners also need to

consider how the relationship between relatively poor farmers and relatively rich staff and volunteers may prevent them from collaborating and from understanding each other.

Currently, planners are seeking to understand what farmers think about New Forest, how they participate in the agroforestry project, and how they make decisions, by conducting research aimed at learning about local farmers and their lifestyles. This is based on the common belief that if project planners knew more about local people, their priorities, their views and opinions, their decision making, the socioeconomic limitations they face, and so on, they could design projects that are more likely to succeed. However, these can be seen as attempts at knowing “the other” because this information is still interpreted through western worldviews, without *also* considering the position of New Forest and western stakeholders and their interactions with villagers. If their relationship to local people is an orientalist one, this information is reinterpreted based on western stereotypes and is likely to be used for advancing western interests, instead of creating a project that truly meets local needs. As we have seen, simply being critical, well-informed, and recognizing that local people are poor is not enough. Instead of simply *knowing* about these issues, planners need to apply this knowledge and look at how the socioeconomic context affects the relationship between outsiders and villagers participating in their agroforestry project, and influence project outcomes.

Similarly, workshops on environmental education aiming at raising awareness about environmental problems and inspiring villagers to lead more sustainable lifestyles are not likely to be successful. As we have seen, local farmers understand New Forest’s strategy and rationale behind carbon offsetting to help foster sustainability in Flora, and are not likely to directly challenge the staff during workshops and other times where they are in contact with the staff and volunteers. However, this does not change the minds of villagers who disagree with the

agroforestry project or with “sustainability” in principle. We have seen that farmers do not disagree with agroforestry or environmental conservation per se, but rather, they are opposed to western-led environmental projects undertaken by outsiders – which they perceive as being unfair due to the large socioeconomic inequalities between westerners and villagers. If the agroforestry project were more participatory, and the workshops were instead aimed at learning local perspectives and asking farmers about their opinions and suggestions about how to improve the agroforestry project, this could lead to better collaboration between New Forest and villagers and arguable increase the likelihood of project success. In Flora, the lack of collaboration and shared understandings between these two groups is not so much due to “cultural differences” (as is assumed by New Forest) but rather to the differences in socioeconomic position. If outsiders and villagers are to collaborate in solving environmental problems they need to address their ethnocentric ways of interacting with local people, but also seek to reduce the socioeconomic differences by reducing the inequalities in decision-making power that divide them.

Offsetting the socioeconomic inequalities through “win-lose” arrangements

This means that the agroforestry project cannot be a win-win solution to climate change and deforestation that benefits both western and local stakeholders equally. Local villagers do not perceive the project as being a balanced, win-win situation – on the contrary, they feel like outsiders still have a lot of wealth and power, and that they use Peruvian resources to further their own interests. For local farmers to accept outsider involvement and their promotion of environmental projects in their village, the power balance needs to be tipped in their favour, through “win-lose” arrangements. In other words, farmers need to see that the amount of economic resources they receive from New Forest is proportionate to their socioeconomic

position in the global economy. Therefore, farmers should be given more power and resources within the agroforestry project if they are expected to collaborate with the foundation.

This recommendation may contradict the views of some staff, who say that New Forest is already underfunded and that “farmers should be happy with what we can afford to give them”. But it is important to realize that farmers do not see it this way. What they see is that outsiders stay in a luxurious rainforest lodge that is owned by an outsider but is on Peruvian territory. They also see privileged westerners that have the money and the permission to travel to Flora, wearing expensive clothes and taking photos of their village and of their rainforest, which they then bring to their countries. These westerners are seeking to implement a sustainability project in Flora, which farmers see as using Peruvian resources to further western interests. For these reasons, farmers expect more compensation for participating in New Forest’s agroforestry project.

There are several ways that New Forest can shift more compensation to local farmers, in the form of economic resources and decision-making power. One possible solution is to give farmers monetary compensation in order to offset some of the wealth imbalance between outsiders and villagers. This could be done by including farmers directly in the market trade side of the economic transaction instead of simply giving them benefits in the form of financial aid, where they are passive recipients of the economic benefits that New Forest offers them. The UK institution is willing to pay for carbon offsets, but they are not necessarily dictating how the project must be organized locally. If outsiders changed their stereotyped beliefs about local farmers and included them in their market trade, the carbon payments could be paid directly to farmers, or even “royalties” on the carbon credits that are being generated. This would increase farmers’ active participation in the carbon offsetting initiative, and they could be responsible for establishing and maintaining their own agroforestry field. This would make New Forest’s role

less prominent in Flora (which would please the villagers who are opposed to outsider involvement in Peru), but the foundation could still be there to assist farmers in establishing agroforestry fields and still have them sign contracts to ensure they comply with the requirements for offsetting Europeans' carbon emissions. However, the assistance provided by New Forest should be ideally financed using additional funds (obtained from the British institution and/or other funding organizations), that does not take away from the cash payments given to farmers. This type of arrangement would be more likely to increase farmers' interest in the project, and they are also more likely to perceive the project as being more just and less exploitative.

In addition, New Forest could give more decision-making power to the local staff member, and let him use some of the money and resources to hire local villagers for implementing the agroforestry project thus making outsiders less involved in Flora, or letting him invest in what he thinks would be best for the farmers. Currently, he is using his power and influence in the village to accommodate the interests of outsiders, but he could bring large-scale positive changes in Flora if he would be given resources and support to implement his own vision. In fact, several studies point out that projects fail because there is no "altruistic leader" that has the community's best interests at heart (Babajanian, 2007). But in this case, the local staff member is in favour of environmental protection in addition to caring very much about the villagers' well-being. It would therefore be a good idea to let him be in charge of fostering sustainability based on his own vision, instead of the vision of outsiders.

Finally, New Forest (with the help of the local staff member), should seek to create a local committee in Flora, where farmers and other villagers are consulted about the agroforestry project and provide their input. This would make the agroforestry project more participatory, and

encourage the type of information sharing and cooperation that would disrupt the orientalist relationship between outsiders and villagers. In other words, New Forest should bring local farmers “in” the macro-scale sustainability discourse. As we have seen in the research findings, the project staff is currently reproducing the sustainability discourse while keeping farmers out of its mental constructs and social practices. This strategy, however, is bound to be ineffective in the longer term. Instead, New Forest needs to be open to local perspectives and to people that challenge its vision.

Here I have provided some recommendations that New Forest’s planners could use to make the agroforestry project more “egalitarian”. However, these recommendations are necessarily limited, as they do not challenge the exploitation between rich and poor stakeholders at the macro level, and in the global economy. As long as these macro relations are not challenged, the orientalist relationship between outsiders and villagers may not be possible to change.

5.4 Concluding remarks

In this study, I have argued that the main obstacle to the successful implementation of New Forest’s agroforestry project (whereby success is understood as fulfilling project objectives, such as environmental education, fostering sustainability, and establishing agroforestry fields) is the socioeconomic difference between outsiders and villagers. These inequalities alienate farmers from the British foundation, and prevent cooperation between these two groups. “The elephant in the field” refers to these socioeconomic differences that are recognized by participants, yet ignored by both villagers and outsiders instead of being explicitly recognized and addressed as a problem. Ironically, the same factors that prevent New Forest from fulfilling

its environmental and educational objectives in Flora also render the project neocolonial, where it can be seen as a form of exploitation between Europeans and local villagers. This finding supports critical studies in political economy that argue that carbon offsetting projects are bound to fail because they are inherently exploitative (Putz & Redford 2009; Smith, 2007).

Focusing on the sustainability discourse – i.e. the material realities, mental constructs, and social practices through which New Forest carbon offsetting initiative comes into being – is useful for identifying which components of the discourse are reproduced or rejected, when/where, and by whom. This informs how the sustainability discourse is implemented in Flora by the farmers, staff, and volunteers, and points to the areas where there are contradictions and inconsistencies between the project's vision and its local implementation.

Moreover, this study shows how the relationship between villagers and outsiders corresponds to the process of orientalism, where westerners are hindered from perceiving the project's limitations due to their own advantaged position, combined with stereotypical beliefs about "the other". Villagers also participate in this orientalist relationship because they deliberately keep outsiders isolated from their local realities and avoid telling them about their complaints regarding the agroforestry project.

Although the neocolonial relationship between outsiders and villagers cannot be challenged in the absence of large-scale changes to the global economy, I suggest that New Forest planners could try making the agroforestry project more egalitarian by focusing more on their relationship with local people, and by trying to offset the socioeconomic inequalities between New Forest and local farmers.

Appendices

Appendix A: Questionnaire for semi-structured interviews

Leading questions:

1. Why are you participating in the agroforestry project?
2. How did you first hear about New Forest's agroforestry project?
3. Are you looking forward to participating in the agroforestry project? (for those who haven't participated yet)
4. What are your expectations; what do you think it's going to be like?
5. Tell me about your experience in the field, when you were tree-planting.
6. How did this experience make you feel?
7. What is your opinion regarding the agroforestry project?
8. Do you think your views and opinions could change after participating in the project?
9. What do you think is the purpose of this project?
10. Tell me about your role in this project.
11. What about the role of local farmers/volunteers? Why do you think they are participating?
12. For volunteers: What were your impressions of the Peruvian Amazon and of farmers in Flora before working in this project? Have they changed?
13. For farmers: What were your impressions of the international volunteers before working in this project? Have they changed?
14. What do you think of sustainable development?
 - a. Do you think it's important to be sustainable?
 - b. Do you think that participating in the agroforestry project is a good way to be sustainable?
15. What do you think of conservation?
 - a. Do you think it's important to conserve the rainforest?
 - b. Do you think that agroforestry is a good way to help conserve the rainforest?
16. Do you think the agroforestry project will be successful?
17. What do you think it would take to make this project successful? What would be the conditions?
18. Where do you see this going in the future?
19. For volunteers: Do they have agroforestry in your country?
20. Is there anything else that you would like to add; is there something important that I did not ask?
21. Do you have any questions for me?

I followed up by asking "Why?" after most of participants' responses.

Other follow up questions were asked, depending on how the interviews proceeded.

Appendix B: Types of trees planted in agroforestry fields

Every plot will be made up of 80% agroforestry combination (native, tropical softwood trees and banana plants) and 20% boundary plantings (native, tropical, hardwood trees), in the following combinations:

Agroforestry combination:

122 x “pashaco” *Schizolobium amazonicum*

30 x “copal” *Bursera cuneata*

600 x “banana” *Musa spp*

Boundary plantings:

15 x “aguano” *Cedrelinga cateniformis*

10 x “cedro” *Cedrela spp*

13 x “shihuahuaco” *Dipteryx micrantha*

Source: Clark, 2009a

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