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To each according to work?

Facets of distributive justice and (e)valuations in the Cuban realm of work

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To each according to work?

Facets of distributive justice and (e)valuations in the Cuban realm of work

Kumulative Dissertation zur Erlangung der Doktorwürde an der Philosophischen Fakultät der Universität Freiburg (Schweiz)

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The present thesis is both a theoretical and a 'practical' demonstration of the idea that any work result is typically the outcome of many peoples' efforts. Although only my name appears on the title page of this thesis, the achievements and merits associated with this research cannot be attributed solely to my efforts and abilities. In fact, a large team has been working in the background, and I would like to acknowledge some of them here. Those not mentioned are in my thoughts, and their contribution is no less significant.

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Summary

This research investigates the (e)valuation of work in the Cuban context after the 1959 revolution up to 2020, where 'egalitarian' state wages have coexisted with a growing reliance on non-state sectors and informal work, exacerbated by economic crises and scarcity. Drawing on a range of theoretical and methodological perspectives, the qualitative case study examines the discourses, *dispositifs*, and individual perceptions and strategies in the Cuban realm of work. Based on the analysis of documents, interviews, and an online survey, it explores definitions and (e)valuations of work, related principles and notions of justice, and individual modes of subjectification.

The findings show that the Cuban context reflects both unique features and parallels with previously studied contexts (market capitalist and state socialist). The Cuban wage structure and the related metaphor of the 'inverted pyramid', a central interpretive pattern in discourses on the Cuban realm of work, represent Cuban idiosyncrasies while also pointing to the prevalence of the equity principle as observed in other contexts. At the same time, the data illustrate the extent to which other principles and related patterns of argumentation also play a role in discourses and *dispositifs* of distributive justice. Indeed, these different principles are not necessarily mutually exclusive, but often compatible. Furthermore, the study highlights how Cuban workers navigate notions of justice and other discursive patterns in identity-forming subjectification processes.

The research contributes to the broader field of work (e)valuation and distributive justice by examining the Cuban case with its specific historical, political and socio-economic characteristics, thus offering new insights into issues of discursive patterns, principles of justice and modes of subjectification.

Keywords: Work, (e)valuation, distributive justice, discourse, subjectification, wages, Cuba

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1 Introduction

1.1 Scope and objectives

How do societies define what is regarded as valuable work? How do they assign value to different forms of work both monetarily and symbolically? During my time working in the social and care sector,[1] I often pondered this question, as did many of my colleagues. The media often notice this issue, particularly in times of crisis or when discussing the justification for 'exorbitant' salaries of CEOs, top athletes or artists. The topic has also been subject of various philosophical and sociological investigations. A number of them question the approaches and assumptions typically used to explain wage distribution in contemporary economies. They challenge, for example, the idea that wages are determined by supply and demand – more precisely, by the marginal productivity of labour and human capital – under the assumption of equal opportunities and a 'functioning' meritocracy. Sociological perspectives emphasize that work can be defined, (e)valuated, and hierarchized in various ways. In other words, definitions, (e)valuations, and hierarchies of work follow certain norms and conventions.[2] These social negotiations are based on and simultaneously (re)produce social power structures.

A review of the literature related to the above issues revealed a relatively large number of quantitative studies on perceptions of distributive justice and the (e)valuation of work, e.g., in the form of occupational (earnings) hierarchies (Gijsberts, 2002; Hipp and Kelle, 2016; Kelley and Evans, 1993; Müller, 2019; Osberg and Smeeding, 2006). There is also some qualitative research aimed at understanding (e)valuations and their implications for individuals or social groups (e.g., Boltanski and Thévénot, 2007; Bosančić, 2018; Dubet, 2006; Menz, 2009; Neckel et al., 2005; Stark, 2011). Most studies focus on the 'Western' world, with some comparing market capitalist and post-socialist economies (Aristei and Perugini, 2016; Duru-Bellat and Tenret, 2012; Gijsberts, 2002; Ignácz, 2018; Kelley and Zagorski, 2004; Meulemann, 2004; Redmond, Schnepf, and Suhrcke, 2002). Typically, all of these studies examine a particular aspect of work (e)valuation (e.g., perceptions of earnings hierarchies) at the macro, meso or micro level. This research aims to contribute to the literature with a comprehensive approach

[1] I have worked in various areas of social work in Germany and Switzerland, both during and between my studies.

[2] Notions and concepts such as (e)valuations, conventions, meritocracy, etc. are discussed in more detail in Chapter 1.4.

that incorporates different perspectives on the (e)valuation of work, its implications for perceptions of distributive justice and for the identities of individuals performing different types of work. I do so by means of a case study that explores different facets of the Cuban realm of work. I started this research assuming that the Cuban realm of work, past and present, can be considered as an 'unusual' case, and therefore suitable to shed new light on issues of work (e)valuation. This assumption of the Cuban realm of work as an 'unusual' or 'exceptional' case is examined in more detail in Chapter 1.4.6. In the following, I briefly outline what originally led me to approach work (e)valuations through the lens of the Cuban case.

Studying work (e)valuation and related issues in Cuba is particularly interesting for a number of reasons related to its exceptional historical and socio-economic context. After a history of colonization by Spain and, from the 19th century onward, significant influence and control by the USA, leading to a series of struggles for independence, Cuban society was fundamentally reshaped after 1959 by a revolution based on Marxist-Leninist principles among others.[3] As in other state socialist countries at that time, in the context of far-reaching economic nationalization, the 'revolutionary' government established a wage system commonly referred to as egalitarian, accompanied by free and/or subsidized goods and services in the areas of nutrition and everyday consumer goods, education, housing, health care, transportation, sports, culture, and communication. While this system was subject to minor reforms over time, its basic structure had remained the same (see, for example Galtés, 2016), at least until the wage scale reforms in 2020/2021. After the fall of the Iron Curtain in the 1990s, both Cuban and international authors have repeatedly highlighted that Cuba has a highly qualified workforce. However, due to the egalitarian wage distribution, the professionals would have little incentive to practice their professions in Cuba (e.g., Anaya Cruz and Díaz Fernández, 2018; Feinberg, 2016; Ritter and Henken, 2015). In a context of ongoing economic crises and scarcity, they would be compelled to emigrate either to another country or to better paid (albeit less qualified) occupations within the Cuban economy. As Sánchez (2014) writes in the blog *14ymedio,* referring to the aftermath of the so-called Special Period of the 1990s,[4] an era that, according to her, "continues to this day":

[3] The historical context of Cuba prior to 1959 and the historiography of the Cuban revolution are not core focuses of this thesis and are therefore not discussed in detail. However, I have addressed these topics in a previous article (Jany, 2018), which is included in the Appendix.

[4] In 1990, Fidel Castro proclaimed the 'special period in times of peace'. The term has since been used to describe the economic depression Cuba fell into after the dissolution of the Soviet Union.

> engineers preferred to drive a taxi, teachers would do anything to work at the front desk of a hotel, and shop counters could be manned by neurosurgeons or nuclear physicists.[5]

This form of professional emigration within the Cuban economy is considered the main cause of the so-called 'inverted pyramid'. The figure of the inverted pyramid is often used in media, political, and academic discourses to describe a non-meritocratic order of the occupational (earnings) hierarchy, for which wage egalitarianism is often held responsible, and which is generally seen as problematic.[6]

Against this backdrop, the aim of this research is to explore **which definitions and (e)valuations of work, related principles and notions of justice, as well as modes of subjectification can be found in the discourses*, dispositifs*,[7] and individual perceptions and strategies in the Cuban realm of work.**

By deepening these questions for the Cuban context, but also by highlighting similarities and differences to previously studied market capitalist and state socialist contexts, this research contributes not only to the literature on Cuba specifically, but also to the international literature on distributive justice and (e)valuations in the realm of work. Work (e)valuation and related issues will remain relevant to contemporary debates, at least as long as "work-centred societies" exist (Krebs, 2002). At the macro level, overarching principles of justice, in the form of widely shared social ideas (Kaufmann, 2016), serve to legitimize stratification and social inequalities. Occupational and wage hierarchies reflect the different ways in which these principles are defined and interpreted. How different tasks, responsibilities, diplomas, etc. are rewarded is justified and negotiated not only at the societal level but also at the organizational and individual levels. Individuals are both affected by and transform societal (e)valuation structures: they can question or validate these structures; they can identify with or distance themselves from prevailing social (e)valuation norms.

[5] All translations from Spanish, German and French are my own, partially with the help of DeepL and ChatGPT.

[6] As emerged in the course of this research, the interpretive pattern of the 'inverted pyramid' is a particular feature of the discourses on (e)valuation and distribution in the Cuban world of work. It is therefore addressed in all four articles of the thesis.

[7] The terms 'subjectification', 'discourse' and '*dispositif*' are used with reference to the Sociology of Knowledge Approach to Discourse and are explained in more detail in Chapter 1.4.5.

The present research specifically examines aspects related to the macro and micro levels to shed light on the above research question. Via a qualitative inquiry based on different theoretical and methodological perspectives, the articles composing this research provide for manifold perspectives on distributive justice and (e)valuations. The elaborations in the following chapters introduce, frame, and complement this 'kaleidoscope' of perspectives on the Cuban realm of work.

1.2 Background and evolution of the research

This present dissertation was conceived as a research project funded by a Doc.CH scholarship from the Swiss National Science Foundation.[8] From the outset, it was designed as a case study comprising different sub-projects, each resulting in individual articles. The aim was to explore various perspectives on distributive justice and (e)valuations within the Cuban realm of work through a blend of theoretical and methodological perspectives. Specifically, the focus was to illuminate the topic from the angles of discourses, *dispositifs*, individual interpretations, and modes of subjectification. This diversity of perspectives aims to improve the quality of the case study, since triangulating theory, data, and methods helps to reduce bias, uncover complexity, and increase construct validity (Gerring, 2017; Mills, Durepos, and Wiebe, 2010; Yin, 2014).

The originally planned case design and diversity of perspectives were maintained and executed throughout the sub-projects, encompassing data collection, analysis, and the final versions of the articles. However, the thematic focus of the overarching dissertation project, initially centered on merit-based distribution,[9] has evolved as the research progressed. This was to be expected in view of the qualitative lens of the research, essentially based on a flexible, iterative, and circular process (Flick, 2014; 2018). The ongoing adaptation of the primary research questions and subsequent steps, including theoretical and methodological approaches, data collection, and analysis, were integral to the original dissertation project. For instance, at the theoretical level, the exploration of the multi-principle approach of justice[10] (e.g., Törnblom and Kazemi, 2015) has broadened and enriched the initial considerations on merit-based distribution. Studying political, media, and academic

[8] Grant no. 184367.

[9] The primary research questions were: How is the idea of merit-based distribution interpreted in Cuba, i.e. which criteria and measures are used to define, legitimate and criticize the worth assessment and evaluations of work? How and why do these interpretations and (e)valuations resemble or differ from those prevalent in other countries?

[10] Depending on the author and the text, the spelling of this approach (multiprinciple, multi-principle) varies.

discourses on the Cuban realm of work within the framework of the Sociology of Knowledge Approach to Discourse [SKAD] (e.g., Keller, 2013) opened up the perspective on individual modes of subjectification of discursive elements, notably through Interpretive Subjectification Analysis (e.g., Bosančić, 2019).

Such theoretical and methodological adjustments to the originally planned project accompanied adjustments to the empirical design and the fieldwork. My research stay in Cuba from January 2020 to March 2021 coincided with the COVID-19 pandemic and thus with a severe and long-lasting lockdown in Havana. As a result, the group discussions, which I had planned as the centrepiece of the empirical work, could not take place. Instead, I conducted an online survey during summer 2020 in collaboration with the Department of Sociology at the University of Havana. After pandemic measures eased, I was able to conduct individual interviews with workers from Havana between autumn 2020 and spring 2021. Due to the continuing lockdown, it was not possible to carry out fieldwork outside Havana as originally planned. I discuss the distinct conditions of data collection amid the exceptional circumstances brought about by the pandemic and its associated social and economic impact in Chapters 1.5 and 1.6.

The changes to the empirical design, particularly the data resulting from the online survey, led to an increase in the number of articles from the originally planned three to four. Moreover, the long intervals between submission and publication of the articles, along with personal and professional developments, also contributed to the completion of the final version of the thesis later than originally planned. Although certain data may have lost some of their currency due to these delays, this should not detract from the overall relevance of the results presented in the four articles.

1.3 Overview of the articles

Table 1 summarizes the scope and objectives, theoretical and empirical perspectives, as well as methods and data of the articles composing this research, each of which illuminates the Cuban realm of work from a different angle.

	Article A	Article B	Article C	Article D
Title	***Trabajo Decente*? Decent Work from a Cuban Perspective** (Izquierdo and Jany 2020)	**The 'Economic Battle' Now and Then: (E)valuation Patterns of Distribution in Cuban State-Socialism** (Jany 2021)	**The 'Inverted Pyramid' and Beyond: Perceptions of Distributive Justice among (Highly) Qualified Workers in Contemporary Cuba** (Jany and Budowski 2024)	**Subjectification of Highly Qualified Professionals in the Cuban Realm of Work: Analysing a Two-Sided Process** (Jany 2024)
Scope	Institutions and labour policies in past and present Cuba	Framework of institutions and political leaders' views in two periods of time (early 1960s and 2010s)	Workers' perceptions of distributive justice in contemporary Cuba (Havana)	Subjectification processes of highly qualified professionals in contemporary Cuba (Havana)
Main objective	To examine Cuban social and labour policies as attempts of a practical application of Decent Work principles in a state socialist context (emphasis on wage and gender policies)	To disentangle and to examine some common assumptions about 'egalitarian state socialist ideologies' based on an in-depth analysis of (e)valuation patterns of distributive justice in Cuban state-socialism	To explore perceptions of distributive justice that (highly) qualified workers in Havana held during the implementation of wage scale reforms in 2020/21	To analyze discursively mediated subject positions and the ways highly qualified professionals relate to these in self-positioning processes
Theoretical and empirical approach(es), methods (and data)	Critical approach to the concept of Decent Work Policy analysis	Multi-principle approach of justice Sociology of Knowledge Approach to Discourse Analysis of (e)valuation patterns Data corpus: 429 documents	Multi-principle approach of justice 19 Face-to-face interviews Online survey (N = 91)	Interpretive Subjectification Analysis Data corpus: 429 + 32 documents 12 Face-to-face interviews

Table 1: Overview of the articles. Source: Created by the author.

1.4 Theoretical perspectives and (sensitizing) concepts

The present research, with its different articles, is based on a single case study design focusing on the Cuban realm of work. A case study is broadly understood as a "a study of a social phenomenon […] where the researcher, guided by an initially broad research question, explores the data and only after some time formulates more precise research questions, […] using several data resources" (Swanborn, 2010, p. 13). Beyond the variety of data and methods, different concepts, theories, and research programmes[11] have informed and guided both the reflections on the overall case study design and the different sub-projects resulting in the articles composing this research. Following a qualitative perspective,[12] theories figure in this research as background theories, including specific epistemological perspectives and initial assumptions, help to problematize and contextualize research questions and findings, and allow to develop sensitizing concepts to investigate the issues of research. In the following chapters, I summarize the main concepts, theories, and approaches or research programmes that have shaped the research in one way or another – whether in developing research questions and designs, or in data collection, analysis, and interpretation of results. Whenever possible, I clarify the evolution of my reflections and the research process over time, enabling readers to understand the choice of concepts and approaches.

1.4.1 Defining (decent) work (and labour)

The starting point and one of the primary questions guiding this research was what is defined as valuable work in societies – specifically, in Cuban society – and why. Following a qualitative perspective, such definitions and their contextualization have emerged from the data. However, in line with Janesick's (2000, p. 384) statement that qualitative researchers should "have open minds, but not empty minds", it seems sensible to make explicit some of the considerations and insights that shaped initial thoughts on the notion of work and related terms and concepts.

First, it is worth noting that definitional considerations are also characterized by the multilingual nature of this work. As the main or co-author of the articles, I am German-

[11] Research programmes include specific understandings of a research issue, theoretical perspectives and methods (Flick, 2018).

[12] I.e., an understanding approach to social phenomena that "starts from the notion of the social construction of realities under study, and is interested in the perspectives of participants, in everyday practices and everyday knowledge referring to the issue under study" (Flick, 2018, p. 2). Principles and characteristics of qualitative proceedings are discussed further in Chapter 1.5.

speaking; the empirical work and related theoretical considerations took place in a Spanish-speaking context, while the language of publication is English. This occasionally led to confusion but ultimately prompted a closer examination of the meaning of terms from different perspectives. The use of the terms 'work' and 'labour' in English is illustrative. This distinction does not exist in German, where the term '*Arbeit'* is generally used.[13] In Spanish, the term *'labor'* exists, but '*trabajo'* seems to be the more commonly used notion in academic and everyday language, which in some cases is then subdivided into further terms. Cuban authors describe, for example,

> *el mundo del trabajo* [the realm of work] in its diverse realities: 1) employment, when it comes to formal and visible remunerated work; 2) informal work, when it comes to certain types of employment for which remuneration is received, but which takes place within a diverse spectrum of rights and recognition; 3) unpaid work, when it comes to domestic and care work, which generally takes place in the home, for which no remuneration is received and which is not recognised in terms of rights (Echevarría et al., 2019, p. 70).

Authors addressing the terms in English-speaking contexts state that work is generally described as a broad concept whose meaning changes over time and space, but basically refers to a broader range of human activities that contribute to the production, maintenance, or reproduction of society. According to Zimmermann (2015, p. 675), it can describe the action and content of an activity, the product of this activity, and a social status. In her view, in contemporary societies, work is reduced to the more "restrictive concept of labour, in the sense of quantifiable productive activity". As "abstract work that can be measured in time and money", the notion of labour would be closely tied to wage labour and the welfare state. Similarly, Jarman (2012) suggests that while both terms indicate a purposeful effort yielding some kind of result, labour refers to (capitalist) relations of production.

However, as "related concepts with overlapping meanings" (Jarman, 2012, p. 1269), the two terms are sometimes used synonymously in everyday and scientific usage. To some extent, this is also the case in the articles composing this research. Nonetheless, the distinction between a broader or narrower conceptualization of work/labour has played an important

[13] With regard to the German language, a particular issue was the translation of the term *Leistung*, which is discussed in the following chapter.

role throughout my research process. This distinction closely links to the question of whether work/labour is (only) understood as a commodity or whether further dimensions are taken into account. Budd (2011), for example, describes nine other aspects of work in addition to its commodity character. According to his classification, work can be understood as: curse, freedom, occupational Citizenship, disutility, service, personal fulfillment, social relation, caring for others, or identity. In market capitalist societies, these further aspects of work often seem to play a subordinate role in individual and collective understandings – which are subject to overarching social (political, legal, and economic) norms prevailing in the realm of work.

For example, authors have argued that the "reduction of the concept of work to that of labour" described by Zimmermann (2015, p. 675) is reflected in the concept of Decent Work (Izquierdo and Burchardt, 2017; Standing, 2008). Formally defined by the International Labour Organization [ILO] in the late 1990s (ILO, 1999), the ILO and its partners have since sought to mainstream the concept with global reach (e.g., ILO, 2008; United Nations, 2015). According to the ILO (2008, p. iv),

> [d]ecent work is defined by the ILO and endorsed by the international community as productive work for women and men in conditions of freedom, equity, security and human dignity. Decent Work involves opportunities for work that: is productive and deliver a fair income; provides security in the workplace and social protection for workers and their families; offers prospects for personal development and encourages social integration; gives people the freedom to express their concerns, to organize and to participate in decisions that affect their lives; and guarantees equal opportunities and equal treatment for all.

Based on these and other considerations on Decent Work, the first article of this research (article A) examines the extent to which this rather narrow definition that emphasizes the commodity character of work is reflected in Cuban past and present social and labour policies aiming to achieve decent work conditions. Furthermore, the implications for policy outcomes regarding labour relations, wage policies, and gender policies are addressed in the article. As the research process for the dissertation progressed, the distinction between work and labour, respectively, between broader and narrower definitions of work, also enabled a better understanding of the theoretical foundations of Cuban state socialist ideology (article B). Finally, in articles C and D, the question is raised about whether and how underlying

understandings of work impact distributive considerations and attitudes, as well as identity formation processes at the individual level.

The concepts inherent to the Decent Work Agenda, such as equal opportunities and equal treatment, are based on an idea of merit-based distribution that is central to contemporary societies with a high division of labour. This will be elaborated on in the following chapter.

1.4.2 Approaching merit-based distribution: between 'ideology' and 'necessary fiction', between legitimating and criticizing inequality

The social idea of merit-based distribution, expressed in the tenet 'to each according to work', is present in the ideational conceptions of both market capitalist and state socialist societies. My initial research in Cuban documents indicated that this principle is explicitly mentioned in the Cuban Constitution (*Constitución de La República de Cuba*, 2018: Art. 65), as well as in other official political documents, e.g., in the *Guidelines of the Social and Economic Policy of the Revolutionary Party.*[14] This raised the questions of what significance this principle holds in Cuban society, politics, and economy, and how it is interpreted and expressed both ideologically and in reality.

The exploration of these questions was shaped by existing theoretical and empirical studies in market capitalist and/or state socialist contexts. Here, again, clarifying language-related subtleties proved instructive and provided insights into theoretical concepts and tensions. Studying the multi-principle approach of justice, discussed in more detail in Chapter 1.4.4, allowed identification of the similarities between what is often referred to in Cuba as the *principio de distribución socialista* [principle of socialist distribution] and the *equity principle*, also referred to as contribution, achievement, or proportionality rule or principle in English literature. In German literature, the *Leistungsprinzip* (often translated as achievement principle or principle of merit) has been extensively discussed over the past five decades or so. Some of the resulting definitional and theoretical considerations, which in one way or another have shaped each of the four articles of this research, are outlined below.

As described by Neckel et al. (2005, p. 368), the *Leistungsprinzip* stipulates that the attribution of socio-economic status merely depends on a person's individually ascribable

[14] This document was created as part of a set of reforms introduced in the 2010s known as *the update of the socio-economic model* and has been revised twice since then. In the current version (PCC, 2021), the *principio de distribución socialista con arreglo a la calidad y cantidad del trabajo* [principle of socialist distribution according to the quality and quantity of labour] is still present.

merits and achievements, and not on his or her origin, race or gender. It can be schematized as shown in Figure 1: Under terms of equal opportunities within a society, an individual input leads to an equivalent, socially desirable outcome regarded as merit or achievement. Honneth (1995, p. 122) also characterizes this as a "contribution to the realization of societal goals". It is according to this contribution to the societal (re)production process – and, thus, to one's accomplishments and abilities (Honneth, 1995, p. 126) – that the socio-economic status (i.e., salary and social esteem) of the members of society should be determined.

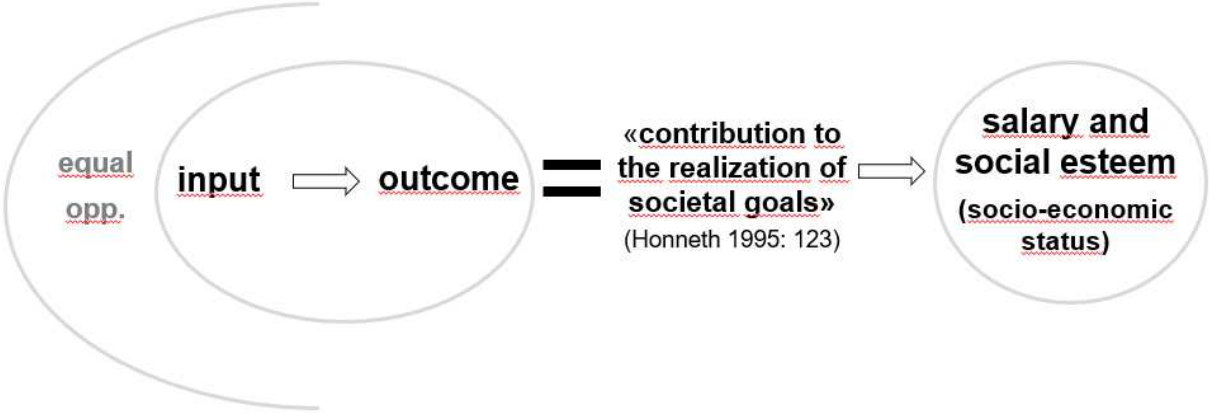

Figure 1: Schematic representation of the 'Leistungsprinzip'. Source: Created by the author based on Neckel et al. (2004, p. 144).

As shown by Droge et al., 2008 in the 1960/70s, some Western authors, particularly within the framework of critical theory, fundamentally questioned the idea of merit-based distribution and associated ideas such as equal opportunities (e.g., Bourdieu and Passeron, 1971; Habermas, 1976; Marcuse, 1964; Offe, 1970). They criticized these in particular for being ideologies that serve to justify capitalist ideology and resulting inequalities. At the beginning of the 21st century, in the context of a new phase of capitalism characterised by neoliberalism, finance capitalism and rising inequalities, various authors revisited these reflections. Some explored how earlier critiques of performance requirements were incorporated into the "new spirit of capitalism" (Boltanski and Chiapello, 2007). Others re-examined injustices associated with meritocratic ideals based on equal opportunities (e.g., Duru-Bellat, 2019). Various empirical studies have demonstrated that distribution according to merit (equity, contribution, achievement, etc.) remains ideological rather than based in reality, whether in the educational system or in the labour market (Cawley, Heckman, and Vytlacil, 1999; Hadjar, 2008; Hartmann, 2002).

However, as Menz (2009) observes, neither normative-philosophical considerations nor empirical findings on merit-based distribution seem to diminish its relevance in contemporary societies. Just as in the heydays of critical theory, the idea of merit-based distribution still plays a central role for two main reasons: On the one hand, existing strata and inequalities are legitimized based on this idea. On the other, it serves as a "normative yardstick for criticizing social inequality" (Voswinkel and Kocyba, 2008, p. 22). Hence, it continues to exist as a shared social idea of distributive justice, or, as Dubet (2006, p. 30) puts it, as one of the "necessary fictions" required for the development of human (inter)action in modern societies based on a division of labour.

International empirical studies have found that when it comes to wage distribution, this idea has wide-ranging support across various social groups, countries, and cultures (e.g., Gijsberts, 2002; Kelley and Evans, 1993). Early studies found little support for wage equality in both market capitalist and state socialist societies. At the same time, individuals and nations seem to differ in their attitudes towards occupational hierarchies and income ratios, e.g., regarding the overall level of income inequality and the income differences that people consider desirable between different occupations (Aristei and Perugini, 2016; Hadler, 2005; Ignácz, 2018; Kelley and Evans, 1993; Kelley and Zagorski, 2004; Osberg and Smeeding, 2006; Redmond et al., 2002; Yaish and Andersen, 2012). Some studies also point to national differences regarding attitudes towards the general order of occupational earnings hierarchies (e.g., Duru-Bellat and Tenret, 2012; Gijsberts, 2002).

Against this background, the aforementioned Cuban principle of socialist distribution was scrutinized in articles B and C: What is the status of this principle in contrast to other principles of distribution; how is it mobilized in arguments and legitimations of (in)equality, and what value is attributed to which types of work from an individual, as well as from an institutional or state-ideological perspective? The sociology of (e)valuations and the multi-principle approach of justice discussed in the following chapters provided valuable support in the collection and interpretation of the data underlying these two articles in particular, but also, more broadly, articles A and D.

1.4.3 Sociology of (e)valuation

As depicted in the previous chapter, former research shows that while the tenet 'to each according to work' seems to be generally accepted as a distribution principle in the realm of

work, the definition and assessment of work – i.e. of what is considered as worthy work – is more likely to vary across time and space. The sociology of (e)valuation offers a comprehensive lens through which to understand such multifaceted processes of valuing and evaluating. At its core is the examination of criteria, norms, and practices that shape what is considered valuable or worthy within specific social, cultural, and economic contexts.

It has to be noted that what is referred to as sociology of (e)valuation here does not denote a singular current, but rather encompasses a collection of studies that examine the valuation and evaluation of goods, people, situations, etc. According to Lamont (2012, p. 208), valuation practices can be defined as "giving worth or value" and evaluative practices consist in "assessing – how an entity attains a certain type of worth". As Krüger and Reinhart (2016) highlight, there are (e)valuation studies on the attribution of monetary or ideational value, formalized (e)valuation practices (e.g., rankings), and investigations into decision-making processes. The latter are mostly based on approaches that rely either on institutional logics (e.g., Friedland et al., 2014) or on specific normative orders of worth, such as the orders of justification (e.g., Boltanski and Thévenot, 2006)

Orders of worth are at the centre of the economics of convention, also known as convention theory, an analytical framework that examines how social norms, conventions, and agreements influence economic behaviours and structures. The approach emerged in the late 1980s and early 1990s, within French pragmatic sociology (e.g., Eymard-Duvernay et al., 1989) as a response to the limitations of neoclassical economics and traditional sociological theories in explaining economic behaviour. It focuses on the ways in which collective understandings and shared agreements shape the coordination of actions in markets, organizations, and various social settings. As Diaz-Bone (2018) explains, conventions are culturally established coordination logics that serve as interpretive frames used for the collective construction and cognition of values and qualities. Depending on the authors, different terms are used to describe these coordination logics, e.g., orders of justification, worlds [*cités*], quality conventions or polis (the latter being used by Boltanski and Chiapello, 2007).

The principles of distribution and linked arguments in the form of justification or critique examined in this research might be understood as conventions, which serve as an interpretative framework for assessing and evaluating justice in the world of work (e.g. in relation to occupational and wage hierarchies). In article B, I introduced the notion of

(e)valuation patterns of distribution, a term that seemed pertinent especially in connection with the discourse-analytical approach based on the concept of interpretive or meaning patterns, which is discussed in more detail in Chapter 1.5.2.2. Conventions, e.g., in the form of justice principles, often also referred to as justice rules, can be considered as important elements of such patterns.

Beyond convention theory, studies belonging to the field of (e)valuation research that emphasize the link between (e)valuation processes and superordinate concepts of values or belief systems have contributed to the theoretical conception of the articles composing this research. Interpretations of the collected data in relation to the (e)valuation of different types of work were shaped, among others, by existing typologies of work-related values and belief systems (e.g., Buchholz, 1978; Furnham and Rose, 1987; Dose, 1997; Budd, 2011). Given that these typologies do not originate from the Cuban context, they primarily served as an initial orientation for coding processes. Care was always taken to ensure that codes were anchored in the material, as explained further in Chapter 1.5.2.

Finally, although recent critical theory may not be directly attributed to the field of (e)valuation studies, this strand of thought has, as afore-mentioned, also shaped the theoretical considerations on (e)valuations in the research presented here. According to Honneth's theory of recognition, what is considered a worthy contribution to society and to its common goals, "what is distinguished as 'work', with a specific, quantifiable use for society" (Fraser and Honneth, 2003, p. 141) needs to be defined, interpreted, and negotiated among the members of that society. To do so, individuals can revert to "a symbolically articulated – yet always open and porous – framework of orientation" (Honneth, 1995, p. 121) for measuring the worth of different types of work, achievements, etc. In the context of the above-described debates on merit-based distribution and the *Leistungsprinzip*, Offe (1970) identified different criteria and dimensions of '*Leistung*' that can be used to describe, define, and finally (e)valuate different types of work along the distinction between an input- and outcome-related dimension.

Input		Outcome		
Resource	Input	Factual	Social	Economic
Talent Qualification	Effort Strain/ Load	Quantity Quality	Problem solving Societal reward	Revenue Profit

Table 2: Dimensions and criteria of 'Leistung'. Source: Voswinkel and Kocyba (2008, p. 23; translation NJ).

The dimensions and criteria shown in Table 2 served as a starting point for general reflections on possible (e)valuation systems in Cuba and later also functioned as sensitizing concepts for the data analysis. Which of these criteria are socially accepted or dominant to legitimize and criticize definitions and (e)valuations of work is time- and space-dependent and subject to societal power structures. This aspect of (e)valuations can be illuminated in particular through SKAD, which is further elaborated in Chapter 1.4.5.

Within the (e)valuation literature, many authors stress the notion of heterarchies, highlighting the plurality of different possible logics or orders of worth that actors might refer to when (e)valuating. As Stark (2011, p. 13) emphasizes, "organizations are settings where multiple principles of evaluation are at play". Indeed, this applies not only to the meso level studied by Stark (2011), but also to the macro and micro levels of society. The multi-principle approach of justice presented in the next chapter further elaborates on heterarchies, as well as on definitions and criteria of justice rules used to (e)valuate work, some of which also served as sensitizing concepts for the present research.

1.4.4 Multi-principle approach of justice

The initial reflections on merit-based distribution and (e)valuations in the previous chapters and the closer examination of Cuban occupational hierarchies, wage and supply systems[15] led me to further explore justice rules relevant to the world of work. The multi-principle approach of justice, also referred to as the contingency or classification approach) (see Törnblom and Kazemi, 2015, p. 25), provided a framework for analyzing societal and/or state discourses and distribution *dispositifs* as well as individual attitudes towards distributions in the world of work, that goes beyond the equitarian approach, also referred to as equity theory.

As depicted by Sabbagh et al. (1994, p. 244), the equity approach, originally formulated by Homans (1961) and Adams (1965) assumes that social justice judgements [SSJ] "are subjective evaluations determined by a single basic principle of justice – the equity principle, which contends that social rewards should be distributed according to people's relative inputs or outputs. It also assumes that SJJ hold universal". According to other studies, the predominance of equity may not be universal in all areas of distributive justice, but at least in wage

[15] The study of wage distribution in Cuba inevitably included an examination of free and subsidized goods and services, with the supply booklet *Libreta de Abastecimiento*, introduced in 1963, being a notable example. This is specifically examined in article B.

distribution and occupational hierarchies. These studies find a general consensus on the idea of equity-based wage distribution in both market capitalist and state socialist societies (e.g., Alves and Rossi, 1978; Gijsberts, 2002; Kelley and Evans, 1993; Sarapata, 1963). To investigate this assumption within the Cuban context, it seemed prudent to expand the conceptual framework and consider the possibility of the presence and relevance of other distributive justice principles. This is consistent with the basic premises of the sociology of evaluation outlined above.

As also described in articles B and C, the various advocates of the multi-principle approach of justice[16] highlight the co-existence of different justice rules – with equity, equality and need usually named as overriding rules. Moreover, this perspective emphasizes that all rules can be further distinguished and divided into sub-rules. In the tradition of distributive justice research, several theoretical and empirical studies propose to classify rules and sub-rules of allocation. The distinction amongst the three principles equity, equality, and need is often attributed to Deutsch (1975). In the 'Spheres of Justice', Walzer (2010) points out that the principle of equity encompasses at least three principles: recognising merit, compensating for particular hardships and granting freedom of exchange. A number of authors have proposed further distinctions (e.g., Brickman et al., 1981; Lerner, 1975; Miller, 2001; Miller and Walzer, 1995; Sabbagh et al., 1994).

The reflections on labour and distribution patterns in the Cuban framework of institutions and political leaders' views in the early 1960s and the 2010s depicted in article B resulted in a schematic summary (Figure 2) of some of these propositions of distinctions and sub-divisions of distributive justice principles (mainly referring to Bank, 2016; Brickman et al., 1981; Törnblom and Kazemi, 2015; Vietze, 2018; Voswinkel and Kocyba, 2008). It distinguishes distributive justice rules on a micro level, i.e., regarding "the fairness of rewards to individual recipients", and on a macro level, i.e., regarding "the aggregate fairness of reward in a society" (Brickman et al., 1981, p. 173) and accounts for allocation rules that are not considered as distributive justice rules *per se*, such as productivity or efficiency. Classifying justice rules in this manner makes it possible to distinguish and draw connections between different justice principles, as well as identifying potential links to other allocation rules.

[16] For a comprehensive overview of concepts and former empirical results, see Törnblom and Kazemi (2015).

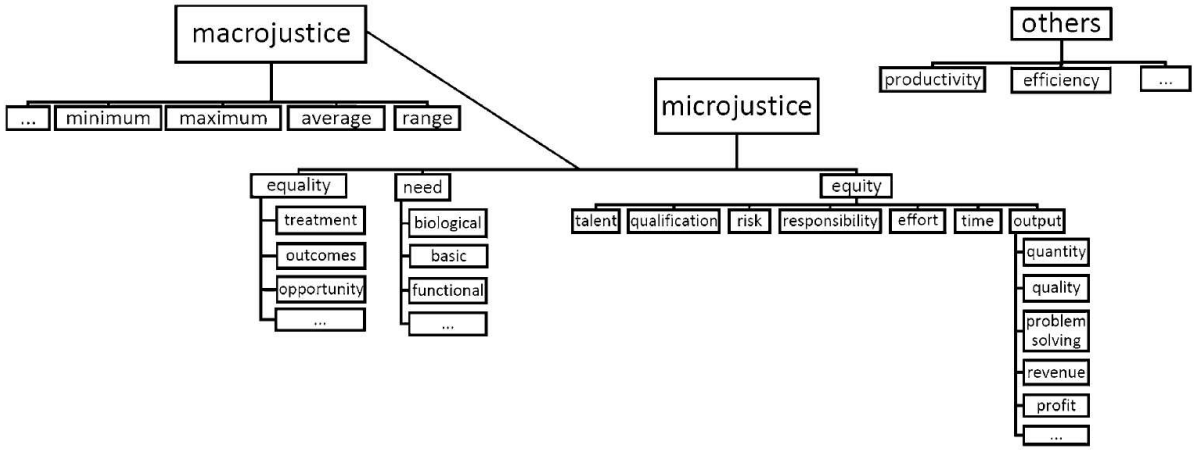

Figure 2: Allocation rules. Source: Created by the author, mainly based on Bank (2016); Brickman et al. (1981); Törnblom and Kazemi (2015); Vietze (2018); Voswinkel and Kocyba (2008).

To summarize, the multi-principle approach and its different classifications of distributive justice principles and other allocation rules, served as sensitizing concepts for the analysis of discourse fragments and interview transcripts (articles B, C and D). The distinction of the different rules and sub-rules was helpful in coding the material, as well as for subsequent type formation. Moreover, the differentiation of distributive justice principles, as depicted in Figure 2 and discussed in various studies within the multi-principle approach, informed the design and analysis of the standardized survey (article C).

1.4.5 Discourses and subjectification

SKAD has shaped theoretical considerations, the choice of methods, as well as the data collection and analysis underlying this research, especially the articles B, C and D. Since SKAD, as well as the related Interpretive Subjectification Analysis can be considered as research programmes that include both theoretical perspectives and methods (Flick, 2018), their epistemological bases and certain key concepts are introduced in this chapter. Some aspects specific to data collection and analysis are discussed in more detail in Chapter 1.5.

Work (e)valuations and associated ideas of distributive justice can be understood as meaning systems or orders of knowledge, for which we can analyze underlying "rules and resources […], and their consequences in social collectivities" (Keller, 2013, p. 2). Based on the general assumption of heterarchies described above, i.e. the plurality of different possible logics or orders of worth, and specifically the multi-principle approach in the area of distributive justice, the question arises as to which of the principles prevail in a society at a

given time. Which evaluation patterns[17] can we find in the framework of institutions and political leaders' views; in measures, policies and laws; but also in organizations[18] and individual perceptions? Which of these patterns belong to dominant norms in the realm of work, which of them represent rather alternative discourses? SKAD proved to be a suitable lens to examine these questions for the Cuban case past and present.

The approach emerged in the late 1990s and early 2000s. It is essentially based on the sociology of knowledge theory of Berger and Luckmann (1990), bringing together diverse traditions from social sciences – such as American Pragmatism and Symbolic Interactionism – with 'objectivist' approaches to knowledge analysis such as those proposed by Emile Durkheim and Karl Marx (Keller, 2013). Grounded in a constructivist epistemology, SKAD understands knowledge as a product of social construction through interpretive processes. Interpretations and actions rely on socially produced, collectively accessible typified elements of knowledge, which are continuously updated, transformed, modified, or expanded through interpretation and action in response to new situations. Society is thus both an objectified reality, meaning a reality created by humans and made permanent in the form of knowledge, and a subjective reality, actively integrated in the course of individual development (Keller, 2012). However, the interpretative paradigm of sociology presents a "micro-sociological and situative bias" (Keller 2013, p. 63) that does not take sufficient account of power relations. SKAD addresses this bias by integrating the perspective of the interpretive paradigm with Michel Foucault's notions of discourse, power, and knowledge (e.g., Foucault, 2010), where discourses are seen as systems of statements that both produce and regulate knowledge and meaning within a society. Foucault (2010, p. 38) characterizes a discursive formation as

> whenever one can describe, between a number of statements, such a system of dispersion [i.e., statements that may differ in form and are dispersed in time], whenever, between objects, types of statement, concepts, or thematic choices, one can define a regularity (an order, correlations, positions and functionings, transformations).

[17] The term is discussed in more detail in Chapter 1.5.2.2.

[18] The organizational perspective is less highlighted in this work, the focus is mainly on the micro and macro levels.

Based on these and further theoretical considerations,[19] SKAD understands discourses as "more or less successful attempts to stabilize, at least temporarily, attributions of meaning and orders of interpretation" (Keller, 2013, p. 2). In line with Foucault, Keller (2013, p. 72) employs the term "utterance" [in French: *énonciation*] to refer to distinct, singular statement-events. Conversely, "statement" [in French: *énoncé*] is already referring to something typical: the same statement can appear across various statement-events/utterances and situational contexts. A discourse can thus also be described as "statement practice or totality of statement-events" (Keller, 2013, p. 72). The articles B and D are based on an examination of such statement-events, which can also be referred to as discourse fragments. Furthermore, all of the articles composing this research are, in one way or another, concerned with the *dispostifs* of (e)valuation in the Cuban realm of work. The concept of *dispositif*, which, in the context of discourse analysis was essentially formulated by Foucault, can be understood as:

> the material and ideational infrastructure, i.e. the bundle of measures, regulations, artefacts, by means of which a discourse is (re)produced and achieves effects (e.g. laws, codes of behaviour, buildings, measuring devices) (Keller, 2013, p. 73).

Furthermore, article D is concerned with the connection between discourses and subjects, i.e., between discursive practices and identity formation. Within the framework of SKAD, a further development of this approach, interpretive subjectification analysis (Bosančić, 2014; 2016; 2018; 2019; Bosančić et al., 2019; Keller et al., 2012), allows addressing the individual level of discourse by using the concept of subjectification, understood as processes of identity positioning or identity shaping. These processes are affected, but not entirely determined, by discursively generated subject positions that reflect social norms of (self-) interpretation mediated through discourses. As in SKAD, interpretive subjectification analysis combines post-structuralist concepts with those of the interpretive paradigm; here specifically, the notion of subjectification, as developed by Foucault (e.g., 1988) and Butler (1997), with the interpretive sociology's concept of identity, particularly influenced by Mead's (2009) theory of the self. As described in article D, very simply put, subjectification can be summarized in the following formula: Subjectification = subject positions + self-positioning. Self-positioning can be understood as the process of dealing with or reacting to discursively generated subject

[19] The theoretical framework on which SKAD builds is presented here in a very abbreviated form, as a more detailed explanation of the traditions the approach draws upon does not seem useful within the scope of this research.

positions. In the context of this research, self-positioning is defined as a process of (self-)interpretation and self-formation that is assumed to, in one way or another, relate to discursive subject positions. In other words, discursively processed subject positions guide or influence processes of self-positioning, but they do not determine them.

1.4.6 Addressing challenges: Studying an 'unusual' case, comparing contexts, and positioning research perspectives

As stated above, this research was designed as a case study. Burawoy (1991; 1998) suggests that researchers draw on their observations of cases to challenge and refine existing theories. According to this perspective, cases are chosen for their theoretical significance. 'Anomalous' cases (Burawoy, 1991; 1998), which have not yet been explained by existing research, can be used to challenge established theories, thus allowing generalization from a case study. Other authors use terms such as 'unusual', 'extreme', or 'crucial' case (e.g., Flyvbjerg, 2006; Gerring, 2017; Yin, 2014). As Schwandt and Gates (2017; referring to Odell, 2001) explain, extreme cases can be used to strengthen or weaken hypotheses or theories. If an extreme case supports the theory, it strongly suggests the theory's validity in more 'typical' cases. Conversely, if the theory fails to explain the extreme case, it is likely to fail in less 'typical' cases. Furthermore, any form of case study allows an in-depth understanding of a given broad research question (Swanborn, 2010), as were the initial questions underlying this research – which resulted in more detailed questions as the research progressed.

From the historical and socio-economic context described in Chapter 1.1, several characteristics can be identified that allow the Cuban realm of work to be described as an unusual or extreme case. These include Cuba's history as a former colony of different colonial empires, a Marxist-Leninist revolution 'ongoing' since the 1960s,[20] its status as an island in the Caribbean isolated from the continent despite its geographical proximity to the US (due to a decades-long economic embargo), ongoing crises, the context of the 'inverted pyramid', etc. The Cuban case was notably promising to:

- allow a deeper understanding of work (e)valuation, e.g. by examining discursive elements and their effects on structures and individuals;

[20] As mentioned in Articles B and D, the Cuban revolution is generally understood as a process rather than a one-off event. While aware of the implications of this understanding, as discussed by various authors (e.g., Grenier, 2020; Gropas, 2007; Jany, 2018), this perspective is adopted in the context of the present research.

- shed light on the possible implementation of decent work principles in a state socialist context;
- gain fundamental insight into definitions and general assumptions underlying principles of justice in the world of work;
- explore the multi-principle approach and thus provide further insights into equity theory.

However, the more I studied the Cuban context and the theoretical aspects mentioned above, the more I encountered a paradox: on one hand, my initial intuition that Cuba was an interesting, unusual or exceptional case regarding the above-listed issues was confirmed; on the other, I also began to question the construction of an 'exceptional Cuban case' as I had originally conceived it. The research on Cuban labour policies and relations (article A) showed, for example, that the concept of work underlying policies in past and present Cuba does not seem to be so exceptional: as in other contexts, it is based on a rather narrow definition that emphasizes the commodity character of work. Moreover, the exploration of (e)valuation patterns within the Cuban framework of institutions and political leaders' views (article B) challenged the assumption of specific values and distribution principles typically attributed to 'state socialist' – as compared to 'market capitalist' – contexts.

When I started this research, it was clear from the outset that direct comparisons with other studies, for example based on interview or survey data, would not be appropriate in the context of this qualitative study. Therefore, comparisons were made primarily in a broader sense through analytical generalization. This is described by Yin (2014, p. 237) as "the logic whereby case study findings can extend to situations outside of the original case study, based on the relevance of similar theoretical concepts or principles". Essentially, these are the conclusions that can be drawn from studying an unusual case as to the validity of general theories or hypotheses, as described above. On this basis, the articles address differences or parallels between a specific context (Cuba) and other specific contexts (e.g. Europe, USA, sometimes in a more general way 'Western contexts'; or other 'post-socialist states').

However, by constructing the Cuban realm of work as an unusual or extreme case, I had to ask to what extent this construction was also contributing to the stereotypes of 'Western' and 'Eastern' or similar distinctions such as 'the Global North' and 'the Global South' found in post-colonial discourses. Keller (2013, p. 69) points out that the literature on discourses also

contributes to building these same or corresponding, actualized discourses: “Discourse research is characterized by an essential reflexivity of which it should be aware: it does not produce truth, but ‘statement events' which are themselves part of a (social science) discourse”. In this sense, the present research could be regarded as contributing to “the western European conception of 'others'” and the idea of the existence of “definable cultural identities” (Keller, 2013, pp. 58–59), in common parlance often associated with national contexts.[21]

These considerations, together with the requirement of qualitative research that researchers reflect on their own position to clarify the perspective and standpoint from which they conceptualize their research and collect and analyse data, led to further thoughts on the ‘application’ of methodologies developed in so-called Western contexts. It is important to note in this regard that the idea for this research arose from literature (including, theories, concepts, methods and data) that has its origins in Western Europe and the North America, although some of it deals with ‘non-Western contexts’.[22]

In article D, I argue that a reflective appropriation of approaches such as SKAD and interpretive subjectification analysis seems reasonable and fruitful in the particular case of investigating discourses and discursively mediated subject positions regarding the working self in Cuba. Its main objective is analysing whether and how highly qualified professionals in Cuba position themselves in relation to discourses and subject positions. During the exchange and collaboration with Cuban social scientists, they encouraged me in my choice of approaches, and I realized that their research was also largely based on theoretical perspectives and methodologies that were familiar to me. In a general manner, I followed the general qualitative research principle of appropriateness in choosing approaches, methods and data (Flick, 2018; see also the next chapter). Nonetheless, I think that reflections on what can generally be referred to decolonizing knowledge and methodologies (e.g., Bendix et al., 2020;

[21] From a discourse-analytic perspective, ‘culture’ can be understood as a ‘discourse field’, i.e. “as a continuous process of negotiation of symbolic orders, artefacts and appropriate practices, which [...] only temporarily crystallise into socially or spatially fixed patterns or structures” (Keller, 2003, p. 284).

[22] As mentioned above, the quantitative literature on distributive justice is particularly concerned with (post-)socialist contexts. This is partly also true for the (e)valuation literature. Stark (2011), for example, in his study on the heterarchy of value in companies coping with rapid change, examines the case of a post-communist Hungarian company in parallel with two New York organizations. Interestingly, Claus Offe, who has significantly shaped the German debate on the *Leistungsprinzip*, has also addressed the issue of Cuban exceptionalism (Offe, 2007; 2011).

Flick, 2023; Gutiérrez Rodriguez et al., 2016; Go, 2016), about which I was rather concerned towards the end of the research process, should have played a greater role in the research design, data collection and analysis, and in the final 'products', the articles. In retrospect, I would have liked to devote more space to these questions.

1.5 Empirical proceeding, data collection and analysis

The present research was designed as a qualitative case inquiry based on the general principles and characteristics of qualitative research. These are presented, for example, by Marshall et al. (2022, pp. 45–46) as shown in Table 3:

Qualitative research typically
• takes place in the natural world; • draws on multiple methods that respect the humanity of the participants in the study; • focuses on context; • is emergent and evolving rather than tightly prefigured; • is fundamentally interpretive; • assumes multiple truths exist, rather than one monolithic Truth.
Qualitative researchers tend to
• view social worlds as holistic and complex; • engage in systematic reflection on who they are in the conduct of the research; • remain sensitive to their own biographies/social identities and how these shape the study (i.e., they are reflexive); • rely on complex reasoning that moves dialectically between deduction and induction; • conduct their inquiries systematically.

Table 3: Principles and characteristics of qualitative research. Source: Marshall et al. (2022, pp. 45–46).

Flick (2018) also speaks of specific attitudes on which qualitative research is based, such as maintaining openness toward the subjects and phenomena being studied, exercising flexibility in how one approaches and navigates the research field, and focusing on comprehending the inherent structure of the subject or field rather than imposing a preconceived structure onto it. He further emphasizes the principle of appropriateness, which ensures that methods are tailored to the specific characteristics of the research issues and contexts, as well the circularity of the qualitative research process (e.g., Flick, 2014). Such an open, flexible and circular approach does not always facilitate an 'accurate', chronologically faithful account of the evolution of the research process, which should be borne in mind when reading the following chapters. With regard to the present study, the fundamentally interpretive nature of qualitative research must be particularly emphasized. This applies to the analysis of the

data, but also, as Keller (2013) describes, to the choice of research design and the data collected.

As mentioned above, one of the key advantages of a case study design using multiple data sources is that it allows to better position, contrast, and complement obtained information. In the following chapters, I first describe the different types of data and the data collection and sampling methods that underpin the articles that make up the research on this case. I then explain the methods used to analyze the data.

1.5.1 Data and samples

Overall, the articles composing this research are based on four types of data: transcripts from five exploratory interviews with academics, a corpus of 461 documents (most of which are text documents), transcripts from 19 interviews with (highly) qualified workers,[23] and results of an online survey (N = 91).

1.5.1.1 Exploratory interviews

At the beginning of the research process, I conducted five guided, semi-structured exploratory interviews with academics (four university professors and one doctoral student)[24] during a preliminary research stay in Cuba in January/February 2018. These interviews aimed to gather information and to reconstruct subjective interpretations (following Bogner et al., 2014) on issues of distributive justice and the organization of work and welfare in Cuba. The rather broad interview guide included the following topics not discussed equally in all interviews:

- Identification of the interviewees' field(s) of expertise, which sometimes led to narratives of their professional biographies;
- The importance of 'the socialist principle of distribution according to the quality and quantity of labour' and other principles of distributive justice in past and present Cuba;
- Peculiarities of the organization of work and welfare in Cuba;
- The current situation of the Cuban realm of work and ongoing reforms.

[23] This designation is explained in more detail in Chapter 1.5.1.3.

[24] For reasons of confidentiality and anonymity, I will not go into detail about the characteristics of the interviewees. They all belong to the social sciences and have, in one way or another, dealt with the Cuban realm of work in their research.

Finally, the interviews served primarily to collect first information about the primary research questions and, as mentioned in article B, to explore the discursive field[25] to obtain a comprehensive overview of documents and possible discourses related to distributive justice and (e)valuations in the Cuban realm of work and welfare since 1959. Consequently, the interview transcripts were not subjected to systematic analysis, except for isolated sections. It is worth noting that like the contextual literature, these interviews can also be considered as discourse fragments.[26]

1.5.1.2 Documents

A comprehensive list of the document corpus can be found in the Appendix. The following provides some additional information on the corpus construction and sampling strategies. These are mainly based on Keller's (2013, pp. 95–101) guidelines on corpus building and the selection of data, which rely on ideas of theoretical sampling from grounded theory methodology (e.g., Corbin and Strauss, 2008).

The research for articles A and B produced a corpus of 429 documents dealing with distributive justice and (e)valuations in the Cuban realm of work and welfare between 1959 and 2021. While some documents mainly served as contextual literature, i.e., used for an introductory, informative investigation,[27] others were subjected to an in-depth analysis to answer the research questions of the individual articles, as will be explained in Chapter 1.5.2. The documents included for analysis in article A are mainly academic and popular literature on the history of the Cuban revolution and its socio-economic policies, legal texts, policy- and action programmes, party resolutions and national statistics. Most of these documents considered in article A later served the purpose of discursive field exploration for article B, i.e., to obtain a comprehensive overview of documents and discourses relevant to the research questions of this sub-project concerned with (e)valuation patterns in the Cuban framework of institutions and political leaders' views – questions that were, in fact, developed and adapted

[25] According to Wuthnow (1989, p. 13; cited in Keller, 2013, p. 42) a discursive field "provides the fundamental categories in which thinking can take place. It establishes the limits of discussion and defines the range of problems that can be addressed".

[26] As indicated in Chapter 1.4.5, a discourse fragment is a "[s]tatement-event (utterance) in which discourses are more or less comprehensively actualized (e.g., a text); [it is the] principal database for analysis" (Keller, 2013, p. 73).

[27] Note that the conceptual boundary between contextual literature and discourse fragments (see footnote 26) is fluid in the 'practice' of discourse analysis. In other words, contextual literature can also be part of the discourse that is analyzed, depending on the research question at hand.

throughout the sampling process. Further documents were included for this purpose, including popular literature and media documents. For the investigation of discursively mediated subject positions presented in article D, the corpus was further expanded to include 32 documents dealing specifically with issues relating to the 'inverted pyramid' that I had identified as an important meaning pattern[28] in the course of the earlier research, as well as with the reforms launched in 2020/21.

The idea was to use this rather broad, heterogeneous corpus to create a 'discursive space', relying on the idea of maximum variation, that would provide a rough overview of discourses and discourse patterns in relation to overarching themes: distributive justice and (e)valuations in the field of work. For article B, I reviewed legal texts and published speeches and, in some cases, writings by political leaders, as well as political/ government documents. The contextual literature, typically popular and academic literature and media articles found through keyword searches, as well as the five exploratory interviews mentioned above, served as a point of reference and complementary information. To locate documents, I relied primarily on online archives and documents available in Swiss and Canadian[29] libraries. At times, I also had access to the National Library in Havana. For article D, I focused on documents discussing the 'inverted pyramid' and related issues such as wage egalitarianism, brain drain and the 2020/21 wage reforms, most of which are media documents. To identify and present the 'provenance' of the different subject positions that were reconstructed in this article, it seemed useful to distinguish between what I have called state-dependent discourse fragments, such as articles in the state-controlled media (e.g., *Cubadebate*, *Granma*, *Trabajadores)*, legal texts, party resolutions, policy and action programmes, and what I have called state-independent discourse fragments*,* e.g., online media such as *OnCubaNews* or *14ymedio*.

A number of individual documents or passages were then selected for detailed analysis, which I had identified as key texts or passages with regard to the subsidiary research questions of the individual articles. Key texts and passages can be understood here as particularly dense, relevant and informative texts with respect to the research questions, and as containing typical or exemplary statements. To identify these, I also relied on theoretical sampling

[28] The concept of meaning patterns is explained in Chapter 1.5.2.2.

[29] As part of the research process, I spent a research visit in Victoria, B.C., between April and September 2019.

procedures, e.g. minimum and maximum variation techniques, together with constant comparisons between different discourse fragments. I relied essentially on the following guidelines provided by Keller (2013, pp. 99–100):

Guidelines for the Selection of Data for Detailed Analysis
• To what extent should it be assumed that a selected document provides answers/results relevant to the question being investigated? • Is it a matter of typical, exemplary utterances, key texts, passages, actors and events? • Does it include the institutional fields, actors, positions and modes of articulation that may be identifiable as relevant? • Is the research goal more oriented to breadth or depth of reconstruction? • With reference to this, how is a document to be located? • How do the selected data fit each other and the targeted discourse or discursive field? • The interchange between individual fine analyses and further data selection may take place according to the principles of theoretical sampling, minimal and maximal contrast. • The original questions may change in the course of the fine analysis, i.e. as a result of confrontation with the data, and may require a modification in the strategies for further data selection.

Table 4: Guidelines for the selection of data for detailed analysis. Source: Keller (2013, pp. 99–100).

1.5.1.3 Interviews with (highly) qualified workers

Articles C and D rely on 19 transcripts of semi-structured interviews with qualified and highly qualified workers as determined by their initial vocational or professional degrees, hailing from various professions and occupations in Havana. The decisive criterion of qualification was chosen based on the initial results of the discourse analysis: Qualified professionals are often portrayed as most affected by the 'inverted pyramid' and related issues of distributive justice and work (e)valuation. The subject positions reconstructed in the research for article D can also be understood to some extent as being specifically aimed at this group of workers. The working hypothesis underlying the interview sample was that this group would be likely to have thoughts on issues of distributive justice and work (e)valuation. Moreover, in the background of the discourse analysis carried out for article B, it proved interesting and meaningful to examine the extent to which these workers relate to discourses and the subject positions they mediate.

The interviews were conducted between November 2020 and March 2021 in Havana. The restriction to Havana is mainly due to the pandemic. As mentioned in Chapter 1.2, I originally planned to conduct group discussions and possibly additional individual interviews covering different locations in Cuba. This appeared impossible in view of the strict and long-lasting lockdown. However, with the slight easing of pandemic measures by the end of summer 2020,

it was again allowed for one to leave the house and meet individuals, while respecting social distance and security precautions. It became possible to conduct individual interviews. Interviewees were approached from the pool of participants in the online survey conducted in summer 2020, or through snowball sampling. Sampling was based on the idea of maximum variation, using a purposive sampling strategy of least similar cases to achieve heterogeneity in terms of professions, biographies, gender, and age. In terms of professions, care was taken to include professions that were particularly emphasized in the analyzed discourse fragments describing the 'inverted pyramid', i.e., doctors and teachers. A comprehensive overview of the interview sample is provided in Table 5.

Pseudonym	Sex	Age	(Original) Profession	Brief summary of occupational biography
Caridad	w	48	Doctor	Worked for twenty years as a general practitioner; quit in 2016. Emigration plans.
Juan	m	49	Doctor	After his studies and specialization as a surgeon, he worked in his speciality for nine years. Then further education and eight years of employment as an inspector in a state firm (not in the medical field). Since 2018, he is a taxi driver for tourists (private sector).
Dayana	w	28	Doctor	Has worked as a general practitioner since graduation.
Isabel	w	59	School teacher	After her studies, she worked as a teacher (mathematics, art) for about twenty years. In parallel, she started baking and selling pastry in 1990. Since 2011, she has been working exclusively as a rental agent for tourists. She has been selling pastry again since the beginning of the pandemic.
Alfredo	m	46	School teacher	After his studies, he worked as a teacher (English) for five years. Language training; informal jobs in parallel. Since 2000, various jobs in the tourism sector (state sector). Simultaneously began to study again. Started to work as a teacher again during the pandemic.
Manuel	m	26	Special education teacher	Three years of language studies, then dropped out. Worked as a schoolteacher for about a year. Worked in bars/restaurants for three years, in parallel started studying special needs education. Worked in another country for a few months in 2019, returned in 2020 due to the pandemic. Finished special education studies during the pandemic.
Estela	w	26	Jurist	After her studies, position (social service) in legal advice (state sector), quit after a few months. Worked in bars/restaurants for about three years. Worked as legal advisor for a private firm during the pandemic.
Ernesto	m	42	Jurist	After school, four years of unskilled work in different areas (state sector and private sector); informal jobs in parallel. Further education and two years of employment in a bank (state sector). Four years of unskilled work in gastronomy/informal jobs (private sector). Six years of unskilled work in a state firm; law studies (evening school) in parallel, successfully completed but has not worked in the profession. Worked for approx. Five years as a tourist guide (state sector). Unemployed since the beginning of the pandemic.
Mario	m	58	Industrial engineer	Since graduation has worked in ten different state firms; different positions and responsibilities (technician, specialist, manager).
Pavel	m	26	(Industrial engineer, *dropped out*)	Three years of industrial engineering studies, then dropped out. Further training in different areas, in parallel worked as a cleaner. Two years of unskilled work in gastronomy (private sector), until the beginning of the pandemic; in parallel has resumed studies.

Lorena	w	26	Architect	After graduation, position (social service) in the state sector for one year. Changed to another company (in parallel part-time work for a private real estate company). During the pandemic, she was dismissed and found a new job after a few months. Has plans to become self-employed in the artistic field.
María	w	23	Performing artist	Studies and simultaneous work in her profession (state sector). During the pandemic, 'experience' in agriculture (self-employed and working in a cooperative). Working as an artist again since late 2020.
Charlie	m	31	Office assistant and computer operator	After graduation, worked at a state-owned pharmaceutical company. 'Alternative' military service (guard duties). Two years of industrial engineering studies, dropped out. Then worked first in the warehouse and later in sales for a tobacco company. Transfer to another tobacco company, where he is now working as a financial analyst and completing a university degree in economics part time. In his spare time occasionally works as a dance teacher.
Bruno	m	51	Jeweller	After a mission in Angola, trained as a jeweller and worked in this profession for several years in a state-owned company. Then started his own business as a rental agent, first for local people, later for tourists, whom he occasionally accompanies as an amateur tourist guide (self-employed). Voluntary work as a delegate of the PCC.
Tony	m	31	Accountant	During military service, worked for MINFAR (kitchen, warehouse, accounting). Afterwards worked in the warehouse of a health company; then in the goods distribution department of a state-owned chain of retail stores. Brief employment in the invoicing department of a tourism agency. Imprisoned for seven months (work in a canteen). Afterwards office work in a polyclinic; at the same time night guards at a private guesthouse for tourists [*casa particular*]. For four years responsible for finances at a church organization. Completes a university degree in economics part time.
Julia	f	59	Physical education teacher	After her studies, worked as a teacher in different schools. At the beginning of the Special Period, she was transferred (together with other teachers) to art workshops, where she worked first in production and then in sales. Then worked as a cashier in different state entities (restaurants, shops) for about 20 years. Since 2012, she runs a private guesthouse [*casa particular*] for tourists (self-employed).
Enrique	m	32	Naval mechanic	Trained and worked as a naval mechanic for a state-owned firm, where he was dismissed due to staff cuts. For the past five years has worked as a tourist guide in a state-owned tourism agency.
Omara	f	60	Tourist guide	Since graduation (foreign languages) has worked in a state-owned entity in the tourism sector (first as a tourist guide, later she became a representative).
Yanelis	f	30	Informatic, socio-cultural studies	After high school graduation, worked for a state-owned retail company (social service) and studied sociocultural studies part time. Afterwards worked in different restaurants; at the same time studied languages; brief attempt to work as a tourist guide (which did not suit her); then as a receptionist in an advertising agency; then again in a restaurant until the beginning of the pandemic.

Table 5: Outline of the interview sample. Source: Created by the author based on the interview transcripts.

The categories of qualified and highly qualified professionals mainly refer to the categorization of the Cuban National Statistics Office (ONEI, 2020) including the levels of upper

secondary education.[30] For the analysis presented in article D, I focused on 12 interviewees (the first 12 listed in Table 5), who can be described as highly qualified, that is, corresponding to the level *superio*r [superior] of the ONEI categorization. Schoolteachers were included in this subsample because of the relevance attributed to this profession in the discourse fragments analyzed. In the case of one university dropout, self-assignment was also considered.

Interviews were conducted based on methodological proposals for 'problem-centred interviews' (mainly following Witzel and Reiter, 2012),[31] which consider both narrative and dialogue elements: An initial opening question aimed to generate a main narration (ideally uninterrupted), which was then deepened with 'immanent' follow-up questions. Further 'emanant' questions could introduce additional topics if necessary. According to Witzel and Reiter (2012: 51), an interview guide covers sensitizing concepts/questions related to the 'problem' "in the form of single thematic fields that are further differentiated by keywords and categories or in terms of exemplary pre-formulated questions". The main thematic fields covered in the interview guide for the Cuban interviewees included:

- Introductory explanations (context, aims and proceeding of the interviews); specifications regarding data protection, confidentiality and anonymization; confirmation that the participant can withdraw from the participation or consent at all times without providing a reason; declaration of consent;
- The interviewees work biography (main narration);
- Complementary questions about decisions and motivations regarding this biography (particularly concerning economic considerations, work satisfaction, reflections on social (in)justice, and the interviewees' concept of work);

[30] That means, graduates of pre-university education, technical and professional education [*medio superior*: *graduados de educación preuniversitaria, educación técnica y professional*]; and higher education: graduates of universities or higher institutes [*superior: graduados de universidades o institutos superiores*]. Initially, we used the designation (highly) skilled. In response to a valid comment from a reviewer of article C that the respondents were not necessarily highly skilled, but rather, given the young age of some of them, highly qualified or at least engaged in higher education, my co-author and I decided to use this terminology consistently.

[31] Problem-centering refers to focusing on a socially relevant issue; the interviewer uses his or her prior knowledge of these issues to understand the interviewee's explanation and to ask questions or follow-up questions that are 'problem-focused' (Witzel and Reiter, 2012).

- An assessment of the current situation of the Cuban realm of work, its biggest problem(s) and ongoing reforms;
- Socio-demographic questions.

The guideline served primarily as a reminder and a set of issues to be addressed in the interviews. There was no strict order to the complementary questions; specific pre-formulated questions generally served more as a 'safety net' for me. I adapted the guideline to the situation and the narration of the interviewees. Nevertheless, the thematic fields described above formed a core that could be traced in all the interviews, thus allowing for a certain degree of comparability for analysis.

Finally, I would like to mention the specific conditions at the time of the interviews. After more than half a year in a state of crisis due to the COVID-19 pandemic and related measures, many of the interviewees had experienced profound changes in their lives. Some had become unemployed, and the majority had to reorient themselves professionally, which had impacted their economic, social and psychological situation. Some of the interviewees interpreted these changes as partly positive, while others experienced them as (very) negative. The topic of work can therefore be seen as a sensitive and potentially delicate one in this context. I believe that I was able to respond appropriately to the emotional expressions of the interviewees. While many of the interviewees said that they experienced the interview situation as positive (some said that it was "good to get some things off their chest"), some were visibly struggling with their emotions at some point (two of them broke down in tears). It may be that at some moments I have prioritized the relational aspect of the conversation over the 'pure research interest' (i.e., making sure that the interviewee felt as comfortable as possible, even if that meant dropping a question or two). However, this is a decision that I defend from both a personal and a research ethical perspective.

1.5.1.4 Online survey

In April/May 2020, given the uncertainty of how long the pandemic-related lockdown would last, I designed an online survey in collaboration with colleagues of the University of Havana. The standardized survey on orientations or attitudes towards distribution and redistribution in contemporary Cuba (i.e., perceptions and evaluations of the current situation, visions of desired situation) was designed to sharpen working hypotheses and to gain access to interviewees for further field research (two-stage/successive sampling). While we deemed

further use (for this research or additional research) desirable, we left this possibility open due to the inherent limitations of the data to be obtained. From the outset, we recognized that strategic sampling was challenging given our resources and means, making inferences to a target population impossible (Cornesse and Bosnjak, 2018; Baur and Florian, 2009). Nevertheless, it provided insight into a little explored area of (e)valuations in the Cuban realm of work.

Items were developed in line with the overarching research question of the research project and the international research on distributive justice discussed in Chapter 1.4, based on existing international surveys (International Social Survey Programme, International Social Justice Project, etc.), adapted to the Cuban context. In summary, the survey included the following topics:

- Satisfaction with work, salary/ income, life in general, changes due to the pandemic;
- Request to rank 10 occupations according to what respondents think 1. Is currently earned, and according to what they think 2. Should be earned in these occupations in Cuba. Changes due to the pandemic?
- Agreement/ disagreement with statements on income inequality, redistribution, work;
- Assessment of the extent to which different criteria 1. Should be important for the determination of wages and 2. Are actually important for wage determinations in Cuba today;
- General attitudes towards the gratuity of health care, education, and the Cuban rationing system/ supply distribution;
- Socio-demographic questions.

Further details on the items are available in the Appendix. After three pre-test rounds with two to four respondents each, during which various linguistic and content adjustments were made, the survey was launched online between June and September 2020 using the software *Limesurvey* – an online tool to create questionnaires, poll votes and surveys. The survey was initially dispatched via distribution lists of the University of Havana (i.e., it was sent mainly to students and employees in the social sciences, economics, humanities and natural sciences) and partly passed on via snowballing. After cleaning the data (mainly by eliminating

incomplete questionnaires), 91 fully completed questionnaires remained, resulting in the following sample:

Age			Gender			Educational level	
21-30	31-55	56-65	F	M	unassigned	University degree	"Upper secondary education"
48	34	9	56	33	2	77	14

Table 6: Sample of the online survey. Source: Created by the author.

The sample is predominantly female, rather young and all respondents can be assigned to the category of (highly) qualified workers (which can be explained by the use of university mailing lists). As the data seemed quite interesting in relation to the research questions of this research, we decided to use it beyond the above-mentioned aims of sharpening working hypotheses and using the contacts for further field research. Due to the limitations imposed by the particular characteristics of the sample on the ability to draw inferences, we used the data in article C for descriptive purposes only, to complement the findings of the qualitative interview analysis, as further explained in the following chapter.

1.5.2 Data Analysis

This chapter provides some background information on the data analyses, organized by data type and the research questions underlying the articles. As mentioned above, the overall approach is interpretive. This particularly involves the development of pertinent interpretation hypotheses, for which "abductive conclusions, that it is to say ideas, thoughts or flashes of insight that derive from dealing with the relevant data material, play an important role" (Keller, 2013, p. 83). Ideally, such hypotheses are developed and discussed in groups, to enable convincing, socially objectified hypotheses to emerge (Corbin and Strauss, 2008; Flick, 2014; Keller, 2013). I conducted some group analyses in the early stages of the discourse analyses, mostly with colleagues and students from the Department of Social Work, Social Policy and Global Development at the University of Fribourg. Unfortunately, due to the COVID-19 pandemic, the planned joint analyses with students and colleagues of the University of Havana could not take place. As a result, I did most of the further analysis of the discourse fragments and interview transcripts on my own. However, collaboration and editing with the co-authors of articles A and C helped to balance this subjectivity. Discussions with my supervisors, colleagues and students, during colloquia (both at my home university and at

guest institutions, and especially during the PROWEL workshops[32]) or informal moments, as well as the written recording of thoughts (although not always in an orderly manner) also contributed to this process.

1.5.2.1 'Policy analysis'

Article A focuses on Cuban labour institutions and employment policies. We described and analysed their evolution and current state in the light of the ILO's decent work agenda. In doing so, we critically examined both the ILO's decent work concept and the key principles of Cuban labour policy that can be associated with decent work. Rather than following a specific empirical method of policy analysis, we focused on describing and closely examining the evolution of these policies and principles since the early 1960s. Thus, our approach was critical analysis in the sense of a rigorous examination and discussion of available information.

For example, in the first part of the article, we highlighted fundamental contradictions in Cuban labour institutions and policies, such as the fact that property was never truly socialized during the nationalization process, while at the same time legitimizing the exploitation of wage labour. We particularly examined the tensions between policy principles and/or objectives (e.g., full employment) and the reality of the Cuban realm of work, shaped by different socio-economic transformations over the years (e.g., the end of the Soviet Union in 1990-1991 and the subsequent reforms of the Cuban socio-economic model). In the second part of the article, we further explored these contrasts between principles and reality through the specific examples of wage policy and gender equality policies. To this end, we compared the principles and objectives outlined in official policy documents and legal texts with quantitative and qualitative literature. For wage policies, this included literature on the composition of household income and expenditure, the composition and purchasing power of state wages, and the differences in income (and social protection) regulation between the state and non-state sectors of the economy. Regarding gender equality policies, we focused on literature dealing with Cuban gender gaps in employment and wages, gender occupational segregation in the productive sphere and research on gender inequalities in the reproductive sphere.

[32] "PROWEL Social Problems and Welfare" is an interdisciplinary doctoral programme of the University of Fribourg in collaboration with the University of Neuchâtel that offers thematic and methodological workshops to support doctoral students.

While the findings of article A provide an introductory overview of developments and the current state (at the time of writing) of labour-related institutions and policies, the research conducted for this article also served as a preliminary discursive field exploration (with the idea of getting an overview of documents, discourses and discourse actors) and contributed to building the corpus of documents for further and more specific examination of discourse fragments described in the following chapters.

1.5.2.2 Documents: SKAD, (e)valuation patterns and subject positions

For the analysis of discourse fragments aimed at answering the research questions for articles B and D, I primarily relied on interpretive analytics (as described in Keller, 2005, 2013), which employ methods of social science hermeneutics to reconstruct discourses. As mentioned above, the selection of discourse fragments implies a certain degree of interpretive work. Many documents in the corpus served to explore the discursive field(s) that appeared interesting and relevant to the original broad research question about interpretations of distribution in the realm of work. Another initial step involved identifying key discourse actors, such as political leaders, as well as relevant (state-dependent and state-independent) media and academics who contribute to the construction and shaping of discourses.

During this explorative phase, I refined the research questions for article B, focusing on (e)valuation patterns of distributive justice within the ideational and institutional framework of Cuban state socialism across two time periods, and later for article D, which examines discursively mediated subject positions regarding the working self in Cuba, as well as how highly qualified professionals position themselves in relation to these discourses and subject positions. These refined questions then served as a guide for selecting specific documents or passages for detailed analysis. For article B, I primarily analyzed political documents, laws, and statements from political leaders in the early 1960s and 2010s, through which I reconstructed (e)valuation patterns represented in political discourses and institutional *dispositifs*. The concept of (e)valuation patterns, as I named it, draws on the proposals of other established "meaning components of discourse" (Keller, 2013, p. 108) referring to typical or typifiable structural elements and patterns of the discourses analyzed, such as 'frames' (Gamson, 1988), 'interpretive schemes' or 'meaning patterns', "which organize the way we interpret situations and act according to such interpretations" (Keller, 2013, p. 108). I understand (e)valuation

patterns as specific meaning patterns related to (e)valuations – in this case, (e)valuations of distributive justice in the realm of work.

In line with interpretive analytics, the reconstruction of such discursive meaning-making elements was primarily based on Grounded Theory (Corbin and Strauss, 2008) adapted for discourse analysis. This means that "not all of the stages in Grounded Theory have to be taken over, but that the concepts present there can be treated as tools that are adapted to the questions and methodological steps in discourse research" (Keller, 2013, p. 109; referring to Clarke, 2005). Discourse fragments, which I identified as key documents and passages, were coded, guided by the concepts of open, axial, and selective coding.

For article B, the in-depth analysis mainly focused on 108 documents that were particularly informative regarding the research questions. To maintain clarity, especially in the early coding phases, I assigned codes to text passages that provided answers to the overarching questions: "Who should get what and why?" and "Who gets what and why?" While assessing the interview transcripts using qualitative data analysis software [MAXQDA], I primarily coded and analyzed the documents for discourse analysis manually – either on paper or directly in Word or PDF files. This decision stemmed partly from my feeling of not being fully proficient with MAXQDA at this stage of the research, but more importantly, from my desire to familiarize myself with the empirical steps of discourse analysis and Grounded Theory by working 'manually' first.

I often recorded comments and memos as handwritten notes, frequently in the form of mind maps, which I found especially helpful for organizing my thoughts. Some of these many 'scribbles' – reated either at my desk while working on documents or sometimes even on loose paper or napkins while out—later proved crucial for reconstructing and typifying discourse elements, while others were discarded. In some cases, I returned to these ideas later, influenced either by my own reflections or by discussions with others. As with the qualitative research process itself, analysis is iterative, as described by Keller (2013, p. 91): "Phases of detailed, fine analysis of individual data […] alternate with phases of hypothesis-formation, theoretical consolidation, and the presentation of interim results, until ultimately the investigation may be seen as 'finished'."

The fine analysis of individual codes and text passages was generally based on suggestions and tools from Grounded Theory, such as "the use of questioning, making comparisons,

thinking about the various meanings of a word" (Corbin and Strauss, 2008, p. 69; these are just three examples from the authors' list of possible procedures). During the above-mentioned group analyses conducted at the University of Fribourg, some documents were also examined using the lens of objective hermeneutics (e.g., Franzmann et al., 2022). This is a specific method aiming at determining a so-called objective case structure, which I did not pursue extensively beyond the early phases of analysis. However, I retained certain aspects of this method – such as forming different readings of a text sequence, posing various questions to the sequence analyzed, and engaging in meticulous interpretation, occasionally insisting on 'nit-picky hair-splitting' to avoid settling on the 'first' or most obvious interpretation. These practices align with the recommendations of interpretive analytics (Keller, 2005, 2013). Additionally, interpretive analytics suggest conducting a situational and material examination of a discourse fragment, alongside an examination of its formal and linguistic rhetorical structure, before proceeding with a detailed interpretive analysis of its content.

For the selection and investigation of the documents and passages that served to reconstruct the subject positions presented in article D, I followed a similar approach to that described above, i.e. based on coding procedures and fine analysis oriented towards interpretive analytics. I understand the concept of subject positions as discursively constituted and mediated "places, expectations, and offers" (Keller, 2013: 74) for the addressees of discourse, as developed within the framework of SKAD and further extended by interpretive subjectification analysis (Bosančić, 2014, 2016, 2019; Bosančić et al., 2019; Keller et al., 2012). Some of these positions began to crystallize during the research for article B. I deepened this investigation by adding more documents to the corpus, especially those dealing specifically with the 'inverted pyramid' (mainly media documents and popular and academic literature). As mentioned earlier, I distinguished between state-dependent and state-independent fragments to indicate the 'origin' of various subject positions. By comparing and contrasting different fragments and including the statements of different discourse actors, I was able to consolidate, expand or (partially) discard initial hypotheses about subject positions. Among the positions mentioned in article D (victim/loser, (e)migrant, engaged socialist worker, profiteer, inventive survivalist), I usually found different variants or sub-positions, only some of which are discussed in the article.

In line with the theoretical and methodological considerations of SKAD and interpretive subjectification analysis, subject positions, as underlying social norms of (self-)interpretation

mediated through discourses, represent one facet of subjectification processes. The other facet consists of processes of self-positioning, i.e., how individuals engage with or react to discursively generated subject positions. As described below, the in-depth investigation of the interview transcripts allowed for the exploration of this facet of subjectification as well.

1.5.2.3 Interview transcripts

The interview transcripts were used, on the one hand, to analyse perceptions of distributive justice in the Cuban world of work and related argumentations, which we refer to as reasoning patterns (article C). On the other hand, the transcripts were used to analyse processes of subjectification, or more precisely, processes of self-positioning in relation to subject positions articulated in discourses (article D). To avoid falling into the trap of a 'simple' search for evaluation patterns or comparisons of discourses and subject positions (see, for example, Bosančić, 2018), I analysed the interviews according to the grounded theory methodology (Corbin and Strauss, 2008). This involved open coding (broad code assignment), axial coding (establishing relationships between identified categories and subcategories; selecting key sequences for detailed analysis) and selective coding (condensing interpretations, identifying core categories, relating to theoretical knowledge), accompanied by notes and comments. The initial questions that guided (but did not exclusively determine) the coding process were:

- How do respondents describe and explain their professional biography in the Cuban realm of work? (article D)
- What role do distributive justice in general, and justice principles such as equity, equality, and need play in the interviewees' argumentations?
- Do the interviewees address these principles when describing their work biography, and if so, how? (article C)

Chronologically, the analyses for article D took place first. In addition to the grounded theory methodology, I followed the suggestions for the analysis and interpretation of problem-centred interviews by Witzel and Reiter (2012) and the recommendations for case and type reconstruction by Kelle and Kluge (2010). Many of the procedures proposed by these authors, such as vertical analysis (reconstruction of individual cases) and horizontal analysis (contrasting cases), are complementary to grounded theory methodology.

In concrete terms, I read the transcripts once or twice and listened to certain parts of the audio recording again if necessary. I then made a rough summary of the biographical sections. Any interpretive ideas that arose at this stage, or even during/after conducting the interviews (usually recorded in a postscript), were also noted. Next came the coding process in MAXQDA, starting with cases that struck me as particularly interesting during the interview or first reading – due to their biographies and/or narratives – referred to as 'anchor cases' (Witzel and Reiter, 2012). Open coding was applied quite broadly to avoid getting lost in countless codes. This also meant that certain passages were not coded if I felt they were too distant from the main research questions.

With reference to interpretive subjectification analysis (specifically Bosančić, 2014, 2018, 2019), the further coding and analysis for article D focused on the overarching theme of self-positioning, guided by what Bosančić (2014) refers to as the 'searchlights' of the subjectification heuristics, i.e. relatively open and indeterminate concepts that nevertheless allow the research object to be empirically captured. In the case of the present research, these were mainly:

- Forms of self-description or, more precisely, self-narratives in which identity positioning takes place, in this case in particular the way in which the interviewees refer to/deal with being a (highly) qualified worker in Cuba (within a specific profession) and the associated:
    - characteristics of these self-descriptions;
    - motivations;
    - strategies and behaviour/ways of acting.

- Forms of references to discourses**,** i.e., forms of relating to and dealing with subject positions (in view of the subject positions reconstructed , but keeping an open mind for other possible subject positions:
    - Which situations of discursive interpellation, which subject positions are perceived by the interviewees?
    - Are interviewees relating to or distancing from discursive subject positions?
    - Which discursive orders, interpellations, subject positions, etc. are seen as ressources, which as restrictions?

- On the basis of which resources are they able to refer to, appropriate, reject or ignore subject positions and how?

By contrasting the 12 transcripts considered for article D and synthesizing the codes into core categories (in other words, into different types of self-positioning), the victim/loser position[33] emerged as one of the central positions on which most of the interviewees relied to describe and explain their own professional biographies. On this basis, I identified the strategies of self-positioning outlined in Figure 3, further elaborated in article D.

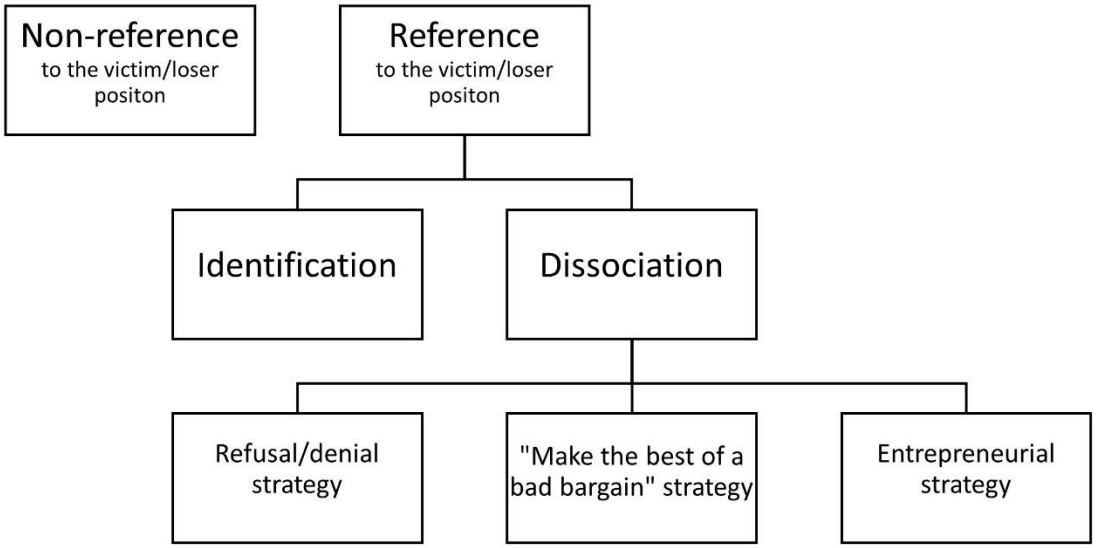

Figure 3: Strategies of self-positioning. Source: Created by the author.

For article C, we focused on the interviewees' perceptions of distributive justice and the related reasoning and evaluation patterns they expressed, taking into account all 19 transcripts. In line with the theoretical perspectives outlined in Chapter 1.4, we assumed that actors are subject to a justification imperative: "In social situations, actors relate the fairness (justice) and the rightness (justesse) of their actions to quality conventions" (Diaz-Bone, 2018, p. 165). More broadly, "individuals draw on specific orders in their interpretations and actions to justify their behaviour as consistent with social norms (Motakef, 2015, p. 39; referring to Boltanski and Thévenot, 2006; Boltanski and Chiapello, 2007).

[33] As further developed in Article D, the discourse fragments examined (both state-dependent and state-independent) frequently portrayed Cuban state workers in general, and highly qualified professionals such as doctors, teachers, lawyers, engineers, etc. in particular, as losers or victims of the 'inverted pyramid'. This can be understood as a discursive positioning offer to these workers, which they can refer to in their self-narratives.

As a reference point for possible social norms regarding distributive justice in the Cuban realm of work – for the specific example of highly qualified workers within the context of the 2020/21 wage reforms – we again employed the multi-principle approach of justice as a basis for coding different justice orientations. This enabled us to identify different facets of support for equity principles and wage differentiation, as well as for needs-based and equality-oriented reasoning. In addition, the coding process led us to compare the extent to which different interviewees perceived the Cuban wage system as unjust. In this comparison, we grouped critiques of perceived injustices related to equity principles (i.e., primarily based on qualification and/or effort/performance criteria) into two main categories: 'blaming structures' and 'blaming individuals', as shown in Figure 4 and further elaborated in article C.

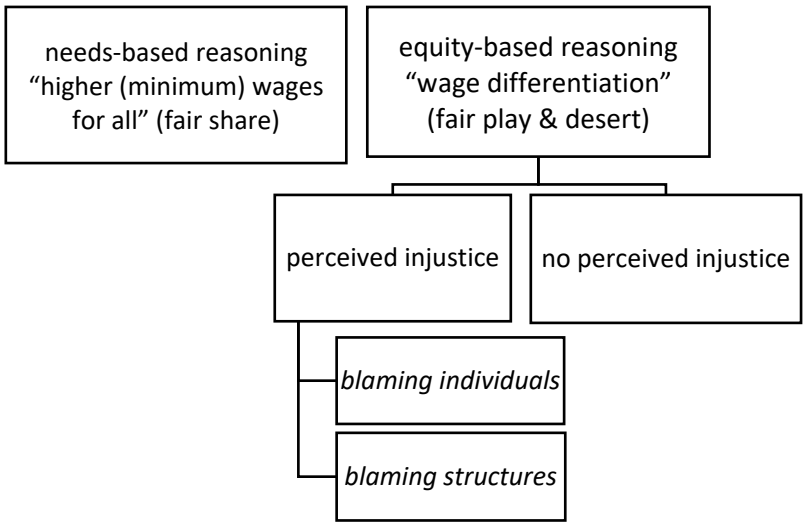

Figure 4: Different reasoning patterns used by the interviewees. Source: Created by the authors.

Based on this, we developed the working hypothesis that the two categories, blaming structures and blaming individuals, tend to correspond with the interviewees' attitudes towards the political system. To capture the latter, we primarily focused on the following points and questions:

- Statements: Do they openly express support or criticism of the system, its policies, the political elite ('the government', 'the politicians', sometimes also simply referred to as 'them' ['*ellos*']);
- Narratives on behaviour: Do their stories on how they thought or acted in specific situations indicate a particular political orientation?
- Experiences: Do they talk about positive or negative experiences with the system?

Linking the two categories through cross-classification, we found that for the given sample, the majority of interviewees with a negative view of the political system in Cuba tended to attribute problems and injustices in the Cuban realm of work to structural issues. In contrast, those with a positive view of the political system were more likely to blame individuals. It should be noted, however, that based on the transcripts, it was not possible to assign all interviewees clearly to the categories and, for many, we could only identify tendencies. For this reason, we also emphasized in article C the preliminary and speculative nature of this interpretive hypothesis. For the analysis presented in article C, we further contrasted the interpretations from the interviews with observations from the survey data, which is addressed in the following.

1.5.2.4 Survey data

Given the specific characteristics of the sample – non-purposive, relatively small and somewhat homogeneous (predominantly female, relatively young and all respondents classified as (highly) qualified workers) – we decided to use the descriptive data to complement the findings from the qualitative interviews for article C. As with the other data sources, we have followed the principles of qualitative research in using the descriptive results of the online survey. Therefore, the selection and presentation of the data itself can be considered as an interpretive endeavour.

The summaries of the data that could be directly generated in *Limesurvey*, with responses displayed in absolute numbers, percentages, and graphical formats, provided an initial overview of the responses to the various items. For certain items that appeared particularly interesting in light of the results emerging from the analysis of the interview transcripts, we created additional tabular or graphical representations of the data. The analyses of the two datasets were conducted in parallel, meaning that we coded the interview transcripts, developed interpretive hypotheses based on this coding, and drew conclusions as described above. We successively checked these against comparable items in the survey data, to complement these conclusions presented in article C.

The survey data allowed us to open up additional perspectives. One conclusion from the interview analysis was that while many of the participants in the semi-structured face-to-face interviews expressed support for an equity-based distribution, they rarely or never articulated how exactly they would envision a just distribution of wages, i.e., specifically *who* should

receive *how much* from the fruit of *which labour*. In the online survey, however, we 'forced' participants to provide such specifications – for example, by asking them to rank different occupations based on which occupations they believed should earn more than others. On the other hand, the survey data also served to underpin conclusions drawn from the interviews, such as the importance interviewees placed on a needs-based distribution, which could be linked to survey responses assessing wage determination criteria, with 'need' functioning as one of the criteria provided.

1.6 Cuba since the COVID-19 pandemic

Between the initial analyses for article A, the data collection for the other three articles and the time of writing this framework, there have been significant changes in Cuba's socio-economic and political context. To complement the background information provided in the articles composing this research, I would like to address briefly some of the socio-economic and political developments as presented in recent literature, since the onset of the COVID-19 pandemic, which is considered an important accelerator of the ongoing crisis in Cuba.

As Hoffmann (2021) noted just one year after the onset of the COVID-19 pandemic, the latter caused a collapse in international tourism and a reduction in remittances. As mentioned in articles C and D, in 2021, the previously parallel currencies, the CUP and CUC, were unified into a single national currency as part of the '*ordenamiento monetario'* [new monetary order], which also unified the exchange rates. The concerns expressed at the time by Hoffmann (2021, p. 9) that the currency reform – introduced during a severe liquidity crisis – would "unleash the inflationary pressures that have built up over years, to drive state companies into the red and to expose the hidden unemployment in the state sector" have come true. Vidal and Luis (2024), using different macroeconomic indicators to measure inflation, estimate that inflation in 2021, primarily driven by the devaluation, reached triple digits, ranging between 174% and 700%, far exceeding the Cuban government's 2021 CPI estimate of 77%. According to ONEI (2024a), annual inflation stood at 30.8% in June 2024 (the year-to-date variation was estimated at 17.8%) – and again it can be assumed that the actual figures are higher.

While many express hope that the exchange rate adjustment will have a positive long-term impact on the Cuban economy (e.g., Vidal, 2019) in the short to medium term, it appears to be perpetuating the severe economic crisis, which, according to Vidal and Luis (2024, p. 288) is at "levels that equal or exceed the crisis of the early 1990s". In addition to the sluggish

recovery of tourism, the energy crisis is worsening, agricultural production has collapsed, there are shortages of medical supplies and personnel, and further structural problems of the economy persist.[34] The licensing of small and medium-sized enterprises (SMEs, in Cuba generally referred to as *MIPYMES*), a further step in the "development processes of non-state forms of property and labour management" mentioned in article A (p. 4), has increased the supply of goods and services in the private sector.[35] At the same time, poverty and socio-economic inequalities in the country appear to have also grown. (Kunzmann, 2024, p. 13) describes these inequalities as follows:

> Cuba's socio-economic panorama has undoubtedly changed. While the 'special period' of the 1990s meant a drastic loss of prosperity for everyone, social differences are now evident more than ever. The increasing differentiation of Cuban society is no longer news, but has accelerated with the current crisis and taken on more visible forms. A young, urban consumer stratum has emerged, whose habits differ little from their counterparts in other parts of the world: social media, Netflix, ordering pizza, and taking a cab home late at night are part of everyday life for them.

According to official figures from ONEI (2024b) the share of state employees mentioned in article A – about two-thirds of the Cuban labour force – does not appear to have changed significantly (2.9 out of 4.5 million employees in 2023). Although the average salary of state workers grew by a about 10% in 2023, the purchasing power of wages fell dramatically due to the above-mentioned high inflation rates; according to ONEI data, the real value of state wages has dropped by around 55% compared to the last pre-crisis year, 2019. At the same time, the government has reduced subsidies (e.g., for fuel, electricity, and transportation). While the *libreta* (supply booklet, as further explained in article B) still exists, it is expected primarily to benefit 'vulnerable groups' in the future (e.g., Kunzmann, 2024). However, persistent and worsening shortages in the state-run stores that distribute *Libreta* goods already severely limit its effectiveness, as many essential items are unavailable (e.g., Brizuela, 2024).

[34] For a detailed discussion of these issues, see Künzmann (2024).

[35] Kunzmann (2024, p. 10) even speaks of the "end of shortage"; for details on the emergence and development of SMEs in the context of the reforms; see, e.g., Cerviño et al. (2024); Díaz Fernández and Barreiro Pousa (2023); Mardones Loncomilla (2023).

In this tense situation, the ‘internal and external’ migration described in article D continues to hold considerable discursive relevance. According to the US Customs and Border Control as cited in Kunzmann (2024), more than half a million people since 2021 have emigrated to the US (representing about 5% of the population), with another 5-10% having emigrated to other parts of the world (based on estimates, as no official figures are available; e.g., Carillo, 2024). For many who remain in the country, discontent is running high, as was already apparent during the 2021 protests (e.g., Salém Vasconcelos and Mason-Deese, 2021). According to Kunzmann (2024, p. 24), “[m]ismanagement, bungling, corruption, and persistent bureaucracy: the list of accusations against government officials at all levels is long and sharp, and is repeated with varying degrees of emphasis in many conversations.” The author also mentions rising crime rates and declining voter turnout, questioning whether the state is losing its relevance and ability to act. The lack of qualified personnel would further undermine the state's ability to implement reforms effectively. Against this background, the assertion made in article A (p. 3) that “reforms should rather consolidate the role of the state as the central institution” of the Cuban economy can be strongly questioned. The process of de-stateization (i.e., “a gradual contraction and retreat of the state in the national economy”, article A, p. 7) seems to have accelerated.

2 Articles

2.1 Article A: Trabajo Decente? Decent Work from a Cuban Perspective

Izquierdo, O. and Jany, N. (2020). Trabajo Decente? Decent Work from a Cuban Perspective. *socialpolicy.ch, 4*(2)*,* article 2.3.

Trabajo Decente?
Decent Work from a Cuban Perspective

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Abstract

In this article, we critically examine Cuban social and labour policies as attempts of a practical application of Decent Work principles in a state-socialist context. We start with an examination of past and present models of socio-economic development and labour relations in Cuba. This is followed by an overview of the main Cuban policy principles related to Decent Work, which we contrast with some developments in Cuban labour realities. To contextualize our analysis, we emphasize the conceptualizations of work, production and property, as well as the institutional logics that underly the Cuban labour models and policies. Finally, two policy areas are highlighted by way of example: wages and gender equality.

Keywords: Cuba, decent work, labour relations, wage policy, gender equality

Introduction

In the 1944 Declaration of Philadelphia, a document that is often mentioned as a predecessor of the concept of decent work, the International Labour Organization (ILO 1944: 1) states as one of its fundamental principles that "labour is not a commodity". However, following the official proclamation of the ILO's Decent Work Agenda (DWA) in 1999, this agenda has been criticized for its narrow conception of work by focusing on core labour standards and endorsing business self-regulation and supply-side economics (for an overview of such criticism, see Hauf 2015). Subsequently, the ILO committed to extending these standards and to moving towards a broader conception of work, intending to include, for instance, informal labour and care work. This broader definition, as it is put forward by the ILO today, places slightly more emphasis on *a social dimension* of work. Nonetheless, the DWA still seems to deviate from its original aim

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"to reduce the commodity character of labour relationships" (Standing 2008: 258), and to lack a critical stance on the ever-increasing emphasis on the commodification and marketization of labour in the 21st century. Drawing on former critiques of the decent work concept in this regard (e.g., Standing 2008, Izquierdo 2017), we in this article argue that work should be considered first and foremost as a *social category*. As a consequence, we suggest that to analyse the *decency* of labour policies and realities, it is important to consider the relations of labour, production and property underlying such policies.

In the following, we will do so with the example of the historical development and current situation of social and labour policies and actual working conditions in Cuba. Since the 1960s, the Cuban state has promoted a wide range of principles associated with the concept of decent work. However, the reality of past and especially of present Cuban working conditions only partly reflects and realizes these principles. The first section of this article introduces and discusses the – past and present – conceptual framework of the Cuban *models of socio-economic development* and *labour relations*. This is followed by an overarching analysis of Cuban labour and employment policies in the second section, focusing on these policies' *key principles* that are associated with the concept of decent work. We contextualise the analysis of the Cuban models and their principles by emphasizing underlying conceptions of work, relations of production and property, as well as the (in)congruency of labour policies with institutional foundations and logics. Finally, we focus in more detail on the examples of wage policy and gender equality measures as two areas in which political claims and the principles of decent work seem to be particularly at odds with everyday realities in Cuba.

In the conclusion, we briefly summarize our analysis and reflect on the importance of a critical stance when assessing labour policies and realities in the contemporary realm of work, also beyond the Cuban case. Finally, we consider some possible future developments and approaches for solutions that would enable more decent working conditions in Cuba.

The Cuban Models of Socio-Economic Development and Labour Relations

After the seizure of political power in 1959, the Cuban revolutionary government opted for a centralist formula based on the empowerment of the state as the leading institution of economic development and guarantor of justice and social welfare. This recourse to a centralist type of governance was justified by a development strategy oriented towards accelerated industrialization, agricultural diversification, internal income redistribution and the reorientation of international economic relations. A large and dominant state sector was created, which at that point became the main actor in the Cuban economy, covering nearly all of its branches. This process (in the following referred to as *stateization process*) guaranteed the state monopoly on resources and their distribution. The process was based on a structure of planning, administration and distribution of power that legitimized and facilitated centralized and hierarchical decision-making on these state resources, leaving very little space for market mechanisms.

Over time, the Cuban development model was gradually adapted to the model that had been institutionalized in other socialist countries. It was based on a property system in which social property mainly took the form of state ownership. The adherence to this model during the most

critical moments of Cuba's history[3] has, to a certain extent, ensured the rights of the working class, but was, at times, also accompanied by high socio-economic costs. Admittedly, the model and its institutions have since then transformed, especially regarding the institutional changes starting in 2011. With the so-called *update of the Cuban socio-economic model*, a far-reaching (and still ongoing) reform process was started, which seems to mark a new trend for Cuban socio-economic development. The Cuban state, as the leading institution and guarantor of people's rights and social welfare, has unquestionably begun to share responsibilities in the areas of societal production, investments, employment, marketing and the provision of certain services to the population.

However, it would be simplistic to think of these changes as a linear transformation process away from state planning and towards the liberalization of market action. According to the reformers themselves, it is better described as a slow and calculated action which first and foremost seeks greater levels of economic efficiency. Simultaneously, in the long term, the reforms should rather consolidate the state's role as the central institution that determines the rules of insertion, negotiation, and empowerment of new economic actors in the Cuban economy. Nonetheless, if we consider recent changes and their effects on the system of social relations that sustains the productive and working spaces in Cuba, we can highlight two developments in particular: Firstly, the emergence and legitimization of new forms of capital-labour relations based on the transformation of the property system, and secondly, the prevalence of bureaucratic and centralized logics of labour relations. Together with the pre-existing, long-standing systemic crisis[4] of the state sector in the Cuban economy, these factors have drastically diminished the effectiveness of a system of labour institutions designed to ensure the rights of the working class. It is important to note that, although the *update* officially started in 2011, this reform process cannot be understood outside the context of the crises and readjustments faced by Cuban society since the late 1980s, which widely impacted the national socio-productive sphere.

With the transformations of the past three decades, the Cuban *model of labour relations,*[5] developed since 1959, has also been compromised. Indeed, there had never been a transition towards truly collective ownership in Cuba, with the empowerment of the labour collective as the real manager of production and property (and without the intervention of the state apparatus). Already in the early years of the Cuban Revolution, trade unions began to take on strong state-corporatist overtones, based on the socialist state enterprise and the bipartite relationship enterprise-workers, in which unions represent both the state and the working class. In this context, Cuban trade unions became the transmission belt of the Communist Party of Cuba, i.e., a channel for ideologies and labour practices with a scope of action predominantly limited to

[3] Mainly related to the crisis experienced in the 1990s due to the fall of the socialist bloc. This resulted in an almost total loss of the Cuban international market and the correspondingly large impact on production capacities and thus on the supply of goods and services within the country.

[4] This crisis is now not only expressed in terms of a tendency towards technological obsolescence and low productivity, but also in a productive cycle that does not allow the use of the national economy's real assets, such as a qualified labour force, the possibilities of productive chains, and the insertion in national and international markets.

[5] Understood as the system of power relations established between capital and labour, and where the state plays a mediating role in the process of building rights within this relationship. As a model, it represents the configurations of the relations between the different actors and serves as an explanatory basis for the establishment of labour agreements.

processes of unionization and membership management, the socialization of workers and the promotion of socialist principles of labour. Moreover, the very term *labour relations* was basically erased from Cuban scientific, political and legal discourses.

Hence, the Cuban model of labour relations evolved into a system that can be summarized, in terms of participation, as highly centralized by the state regarding both resources and strategic and operational decisions. As such, the model expresses the basic contradiction of the Cuban property system, in which property was never really socialized and the expropriation of the wealth generated by the workers, i.e., the exploitation of wage-labour, has been legitimized. Moreover, this contradiction is expressed in institutions that systematically curtail active labour participation, either through normative inefficiency (as the design of the model does not ensure participation), or because participation takes place through other channels (non-labour participation structures, e.g., on the community level or in mass organizations). The equalization of social property with state ownership resulted in vertical decision-making structures and a trade union unable to represent workers in collective negotiations. Ultimately, ignoring a continued exploitative situation based on salaried work – even if in conditions of (state-)socialist management – also meant ignoring the possibility of conflict among the principal actors of labour relations, which further limited the possibilities of union action.

This historically determined reality is compounded by the socio-economic transformations that have taken place in the country since 2011. As described above, socio-economic restructuring in Cuba is an ongoing process that, although the *update* officially began in 2011, has been developing since before 1990 through successive reforms that had already altered the country's productive sphere. However, these reforms have not been accompanied by a well-thought-out reformulation of labour relations. These have been strongly marked by a static trend in the trade union model developed by the *Workers' Central Union of Cuba (CTC)*[6], which has kept its structural and functional premises unchanged. Indeed, it is true that *the update* is not the first substantial restructuring of the socio-economic dynamics that have characterized the Cuban development model.[7] But with the current reform process, the state has given impetus to important development processes of non-state forms of property and labour management. This has led to the proliferation of new sectors in the economy and, consequently, to the emergence of new actors in Cuban labour relations: so-called mixed companies (mainly joint enterprises with both national and foreign capital), non-agricultural cooperatives, as well as the actors of Cuba's relatively small but growing private sector. The latter includes self-employed people and owners of small businesses (known as the economic area of *cuentapropismo*), as well as (very few) companies with entirely foreign capital.

These emerging economic sectors and actors also present new challenges for Cuban trade union action, which, under the aegis of the CTC, has been characterized by a practice of state-

[6] The *Central de Trabajadores de Cuba* (CTC) is the country's sole representative of the branch unions in the Cuban economy. It represents the continuity of the national trade union practice since the 1930s, which is class-based and has been moving towards a more state-corporatist projection based on the particularities of the Cuban model. At present, 16 national unions are grouped within this trade union centre by branch of the economy. The CTC is represented at the highest levels of government, participating in the main spaces of government management in the country.

[7] Examples of former restructuring processes are the adoption of the *System of Management and Planning of the Economy* (SDPE) in the 1970s and the *Process of Rectification of Mistakes and Negative Trends* in the 1980s, as explained in footnotes 10 and 12.

corporatist trade unionism under the logic of state management of the economy. It is true that, in view of the reform process and the new socio-productive situation in Cuba, there are ongoing attempts to develop trade union policies that include these new actors in Cuban labour relations. However, these policies are characterized by mechanical logics that do not favour trade union participation in the newly created labour sectors because they do not recognize the particularities of their structure and functioning that are distinct from the state sector (for example property relations, the nature of incomes and salaries, or access to and the use of technology).

To summarize, since the 1990s, Cuban labour relations have been going through a process of structural dynamization towards a multi-stakeholder and multi-sectoral society. In a best-case scenario, the emergence of new actors and new relational structures between capital and labour could contribute to the configuration of new strategies of union action within the Cuban socialist project and allow for the construction of novel spaces of confrontation. So far, however, it seems that these changes have only made the existing Cuban trade union model less effective. What is more, the socio-productive relations of non-state forms of labour and property management are characterized by a diversity and dynamism that have still not been covered by the regulatory apparatus. This also led to the precarisation of labour in different sectors of the Cuban economy – a precarisation that is reflected, for example, in a lack of labour rights in the so-called *non-state sector*, or in the decreased purchasing power of wages in a large part of the *state sector*, as described below.

Principles and Realities of Cuban Labour Policies

The *stateization process* of the Cuban economy, which began with the nationalization of the main means of Cuban economic production in the early 1960s, was accompanied by an important decapitalization of the country, including both financial and so-called human capital, as a large proportion of investors and skilled workers left the country during the first years of the Revolution. New social and labour policies were developed to give support and legitimacy to the then-proposed development model, to respond to national and international political and economic dynamics, and to allow for the control of national labour resources. To this day, these policies have taken into account almost all contemporary principles of the Decent Work Agenda. However, the effectiveness of said policies, which aim to ensure the (socialist) principles of (decent) work in Cuba, is largely impaired by the socio-economic developments of the country, as well as by its framework of labour relations.

The principle of *full employment*, in force until the early 2000s as one of the fundamental pillars of Cuban social and labour policy, is perhaps its most controversial one. It was based, firstly, on the strong emphasis on social development, and secondly on the high degree of state control over national resources (material, financial and human). In practice, the application of this principle translated into political strategies driven by the *social deficit* inherited from previous governments (low and/or unequal levels of education, health coverage, territorial development, etc.). These strategies eventually generated tensions between social and economic development priorities, resulting, for instance, in the goal to strike a balance between the objective of safeguarding employment and at the same time promoting innovation, efficiency and productivity. Together with the structural crisis that began in the late 1980s/early 1990s (and

the transformations carried out to overcome this crisis), this finally led to the disappearance of *full employment* as a principle and practice of Cuban employment policy.[8]

Cuban employment policy and strategy strongly emphasized *educational development*. Educational policies aimed to reconfigure the qualification structure of the national labour force so that it could cope, on the one hand, with the low availability of qualified labour on the national level in the first years of the revolution, and on the other hand, with the need to develop the most socio-economically disadvantaged territories. In practice, however, the structural tensions linked to full employment also affected educational strategies and developments, generating a high supply of qualified workers not linked to installed and/or available production capacities. Nonetheless, the emphasis on education allowed for the development of so-called human capital that represents a potential asset in the contemporary Cuban development model, as well as a comparative advantage regarding the country's integration into the international economy.

The *freedom to choose a job* and *equal opportunities to access it without discrimination* of any kind are two further principles[9] that appear controversial both in the policy design and in practice. Very closely linked with the principles of full employment and educational development, they cannot be understood outside of a system of labour insertion where the educational level represents the fundamental motor of social mobility, at least until the end of the 1980s. Thus, the freedom to choose and access employment without discrimination, in a context of almost absolute state control over labour resources, was mainly equated with the freedom to choose an education and a professional career – which, in turn, was limited by the capacity of the state to offer jobs. Finally, two other principles are worth mentioning here, namely the *prohibition of child labour* (with an official working age of 18, and special legislation for adolescents between the ages 15 and 18 who have completed their studies in professional or vocational education), as well as *health and safety in the workplace*. The latter is one of the least institutionalized principles within politics, which is mainly due to a lack of control and development mechanisms.

It must be stressed that the development of each of these principles is closely related to the system of labour relations that prevailed in the country until the mid-1990s at least. The state as guarantor of each of these relations[10] has played a constant and important role for the development, the achievements, but also the deficiencies of this system. Achievements that are sustained until today are linked, first and foremost, to access to employment (both in quantitative and qualitative dimensions), which is considered a citizen's inalienable right and which is based on inter-institutional relations that follow a logic of state assurance and planning. The deficiencies of the system had already been apparent in the 1970s/80s, when the statist ownership model was enforced, but they were undoubtedly entrenched during the structural crisis of the 1990s. Over time, the lack of a *de facto* appropriation and socialization of both the means of production

[8] Although the official disappearance of this principle from Cuban employment policy is attributed to the year 2010 (see, for example, Echevarría, Rojas and Tejuca 2019: 151), the pursuit and realization of this principle was affected much earlier *in practice*.

[9] The principle of *equal pay for equal work* is also closely linked to this.

[10] From the point of view of generating the necessary productive capacities and labour resources, but, more importantly, also from the perspective of generating the institutional frameworks for the functioning (and control) of this system of relations.

and of the wealth created by the workers contributed to the development and institutionalization of bureaucratic mediation, which ended up undermining the sustainability of employment policies and realities, as well as economic development in general.

In addition to such policy deficiencies, a set of problematic dynamics and processes linked to the realm of work has become apparent in the past decades. In some cases, these dynamics and processes resulted from the crisis of the 1990s and the loss of trade relations with the Socialist Bloc. In other cases, they were consequences of the very strategies designed to face this reality. One of the main problems resulting from the crisis was the decline of general employment levels by up to 15% – including a significant decrease in state employment due to the decapitalization of this sector (Izquierdo 2016). We may state in this regard that although the decline in employment was already announcing itself during the so-called *Process of Rectification of Mistakes and Negative Trends*[11] in the last five years of the 1980s, it was certainly aggravated by the crisis of the 1990s.

One of the main strategies to face the new realities after the end of the Soviet Union was manifested by what could be called a process of *de-stateization*, i.e., a gradual contraction and retreat of the state in the national economy. This process began in the 1980s with the opening up to self-employment, the creation of joint ventures and the transition of most state-owned farms to the cooperative sector. This process has been ongoing ever since and has certainly been intensified with the structural readjustments of *the update of the socio-economic model* during the past decade. The exit strategies of the state contributed to reversing some of the impacts of the crisis in the 1990s (some of which continued into the 21st century) and have improved employment rates, especially in the newly created (or revived) sectors of the economy. At the same time, these strategies presented new challenges for an already unstable social and labour policy. One of the main challenges was the applicability of the above-described principles in a context where the state was losing its capability to ensure productive capacities and therefore opened the economy to new actors. With this process, there emerged social and labour dynamics that were alien to many of the logics underlying Cuban employment policy and its essential principles. In its old configuration, the state remained limited in its capacity to act and to generate new institutional dynamics and regulations, especially regarding informality and informal work. This has led to high levels of labour precarisation, particularly expressed in: high unemployment rates (especially regarding youth, female and urban unemployment); the worsening of the tensions between available production capacities and the qualification and geographic location of the workers; the deregulation of labour relations; a strengthening of the informal sector and an increase in informal economic practices in the 1990s.

Today, even if certain levels of economic revival and the maintenance of the fundamental principles of social and labour policy are seen as indisputable, the precarisation of work remains visible in different areas within the state sector. This is, on the one hand, closely linked to the inability of the jobs in this sector to ensure the reproduction of workers (as human beings) in areas that are not considered to be motors of the economy. On the other hand, it is also linked to the conditions and organization of work in this sector. Precarious working conditions are also becoming increasingly evident in non-state sectors but here, they are rather linked to the

[11] A political reform campaign to redirect socio-economic policies and to find a middle course between the "idealist errors" of the 1960s and the "economic errors" of the 1970s (Mesa-Lago 1994: 127).

normative and organizational aspects of work. What appears to be fundamental here, is the fact that the state is losing control over the real applicability of employment policy by relinquishing part of its representative role within the capital-labour relationship to the non-state sectors of the economy.

In essence, Cuban social and labour policy continues to maintain its founding principles with greater or lesser levels of institutionalization. Unfortunately, the Current Labour Code, enacted in 2014 (ANPP 2014), has even weakened many of the above-discussed principles of Cuban employment policy and has not ensured sufficient progress in labour relations. Although the code gives recognition and legitimacy to the rights of workers and trade unions under the conditions of the above-outlined contradictions, it conceives of workers as subordinate subjects and conceals their practical possibilities of action and control – to which they are constitutionally entitled. The Code is not expected to be changed until at least three years from now (at the time of writing, i.e., spring 2020) and will thus in the meantime increase the contradictions and institutional gaps Cuban labour policy is facing today.

This being said, in the context of changing socio-economic conditions and the ongoing reforms, further principles and measures have been included in Cuban employment policy over the past years. Some examples are: an increasingly territorial vision of employment policy based on the development of territorial employment programs; the strengthening of the workforce for emerging economic sectors (tourism, biotechnology and pharmaceutical industry); business resizing and rationalization of excess personnel under conditions of salary assurance (according to the time of services provided); the development of training programs regarding the re-qualification of workers who have faced processes of staff rationalization and workers who are newly looking for jobs; the assurance of job placement for higher education graduates (and protection of those who graduate from technical-vocational education); the creation of special employment programs aimed at the most vulnerable groups of the employment population (such as disabled persons, single mothers and other population segments that require it); guaranteeing the retention of qualified workers in key sectors (from a social point of view), such as education and public health (particularly in terms of rehiring regarding the former and salary regarding the latter).

However, we need to stress again that the conditions for social dialogue between the fundamental actors of the Cuban model of labour relations continue to be problematic. In view of the diversification of these actors in contemporary Cuba, this appears to be the basis of the contradictions that sustain the ineffectiveness of this social and labour policy in terms of the fight against the precarisation of labour. To further illustrate these contradictions, we will, in the following, discuss the examples of wage policies and gender equality measures – two areas in which the political claims and principles of decent work seem to be particularly at odds with Cuban everyday realities – in more detail.

Wage policy

In accordance with the second pillar of the *Decent Work Agenda*[12], the principles promoted by Cuban wage policies since the early years of the revolution have formally aimed to meet decent wage criteria – within the particular framework of a national economy based mainly on state property, as explained in the previous sections. However, the reality of Cuban wages is far more complicated, especially in contemporary Cuba.

The salary system of the Cuban *state sector* – which, according to official statistics (ONEI 2019), still employs around two-thirds of the Cuban labour force – is based on standardized and centrally fixed wages. Historically, these can be traced back to the introduction of unified wage scales in the early 1960s. These scales, as well as the corresponding policies, have been slightly changed and adapted in the past decades. However, the system's basic principles have remained steady over time: The core of the wage system is formed by a minimum wage, a unified wage scale at the national level and two basic forms of payment: payment according to time and payment according to performance (Galtés 2017: 67). Although the attempts towards complete wage equalization and total demonetization from the late 1960s (e.g. Hernandez/Mesa-Lago 1971) were abandoned in the 1970s[13], Cuban state wages are until today considered to be relatively low in international comparisons and to present little differentiation between different categories of occupation. However, it is often stressed that these features of Cuba's salary system have to be considered against the backdrop of the country's social policy tradition, that is, free and universal education and social protection services, subsidies (e.g., for electricity, communication and culture), and the distribution of food and basic consumer goods (e.g. Dominguez 2017).

As described previously, socio-economic developments in the past decades have presented new challenges for Cuban institutions and policies, especially in terms of social protection and decent wages. While prices increased dramatically during the crisis of the 1990s, real wages are estimated to have fallen between 70 and 90% (Mesa-Lago/Pérez-López 2014: 14; Yaffe 2012: 37). As a result, labour and income in economic spheres outside of the state sector (i.e., the private sector, mixed enterprises and the cooperative sector in the formal economy, but also informal work, underground and illegal activities) became increasingly important. The introduction of a dual currency system[14] and the boosting of the tourism industry to combat the effects of the crisis contributed to the socio-economic division in these different sectors and spheres.

In 2010, in view of the impending *update* of the economy, the Cuban government had announced the dismissal of a large portion of state sector employees. Although these layoffs

[12] Which specifies that measures of social and labour protection should include "[p]olicies in regard to wages and earnings […] designed to ensure a just share of the fruits of progress to all and a minimum living wage to all employed and in need of such protection" (ILO 2008: vii).

[13] Notably with the adoption of the *System of Management and Planning of the Economy* (SDPE), which was based on the Soviet model.

[14] Based on the *National Cuban Peso (CUP)* and the US-Dollar; in 2004, the latter was replaced by a distinct convertible currency, the *Convertible Peso (CUC).*

eventually occurred more slowly and on a smaller scale than originally planned[15], it is estimated that throughout the past decade, more than half a million workers were dismissed from the state sector (e.g. Bye 2020: 33). Those who have continued to be state-employed often rely simultaneously on jobs and incomes outside of the state sector (see, e.g., Echevarría /Tejuca 2017; Galtés 2015). This is what Feinberg (2016) labels the *GESPI category*: government employees with a significant private income. He makes a conservative estimate of this category at 10 to 20% of the public workforce (Feinberg 2016: 111). Certainly, few workers could live on their state wages without relying on other sources of income – whereby various forms of material and immaterial income supplements come into play (Ritter 2006). It is worth noting in this context that for many Cuban households, remittances have become an equally or *more* important source of income than work-related incomes, which contributes to poverty reduction, but also widens inequalities within society (Barberia 2017).[16] Regarding the overall situation of social protection, health care and education, it is true that the Cuban state has, until today, maintained universal access to basic goods and social services, but their availability and quality has declined (Dominguez 2017).

In the context of little available statistical data, the dual currency system, and the close entanglement of wages, social services, subsidies and food rationing, it is difficult to assess the purchasing power of state salaries. Nonetheless, until today, most Cuban incomes, and especially wages in the Cuban state sector, are considered to be below the subsistence minimum. In the past years, this has been repeatedly acknowledged even by Cuban political leaders, who, for instance, stated that "it is true that the salary does not meet all the needs of the worker and his family" (Castro 2014), and that salaries are "insufficient" to cover the necessities of the workers (e.g. EFE 2019). In the past decade, there have been wage increases in both the state enterprise system and in the public sector, and compensation schemes were further diversified (emphasizing, for example, performance-related pay). However, although nominal average salaries have grown in the past decade, this has hardly been the case for real wages, which are considered to "not cover the cost of Cuban daily life" (Echevarría/Tejuca 2017: 156). According to Togores/García (2003: 4), until the 1980s, wages in the state sector accounted on average for about three-quarters of household income, while by the 1990s, they represented only slightly more than half of it. Vidal (2016: 154) states that the purchasing power of the real average state salary in 2013 represented 25% of the 1989 salary purchasing power. In 2016, according to "personal and extra-official information provided by then Minister of Economy Murillo […] a family of four with two breadwinners would cover only 25% of the family's basic needs through their

[15] In the course of the year 2010, different government officials provided varying information as to the planned number of layoffs, which ranged from 1,3 to 1,8 million employees (Bye 2020: 32). In accordance with the objectives of the reform process, the workers that were actually laid off from the state sector are supposed to be absorbed by the growing mixed, cooperative and private non-state sectors. Thus, the dismissals went hand in hand with, for example, the extension of licenses for *cuentapropistas* (self-employed people and owners of small businesses). For those workers who did not immediately find a new occupation, compensatory measures were provided in the form of a partial and temporary salary replacement and support through the social welfare system (Mesa-Lago/Pérez-López 2014: 124).

[16] The social structure resulting from this income situation is commonly interpreted as an *inverse pyramid* (e.g. Galtés 2017; Luis 2017). In a nutshell, the term is used to describe disconnections (or, in normative terms, misconnections) between the three parameters qualification, work and income. The inverse pyramid is in turn seen as a cause for low productivity, working motivation and a *brain drain* within the Cuban economy.

average incomes" (Bye 2020: 86).[17] Anaya/Garcia (2018) estimate basic expenses for Cuban urban families of three, accounting for subsidies and food rationing. The authors conclude that in 2016, an equivalent of two to three average wages in the state sector – or nine to ten minimum wages[18] – was needed to cover the estimated amount of such basic expenses. This does not take into account additional expenditures, which are part of everyday Cuban life (household equipment, repair works, internet, etc.).

Wage policy (together with the abolition of the dual currency system) has been highlighted by Cuban political leaders as one of the priorities of the current reform process. The guidelines of the *Update*, the *Lineamientos de la Política Económica y Social*, tackle this only in a very general manner, stating the aim to

> *restore the role of work and the income obtained from it as the main way to generate quality products and services and increase production and productivity, and to achieve the satisfaction of the fundamental needs of workers and their families. (PCC 2017: 28)*

In the last few years, different measures and reforms have been introduced to combat some of the above-described issues related to wages and incomes in contemporary Cuba. They mostly concern regulations about employees in the state sector, such as recent increases in minimum salary (from 225 to 400 Pesos per month, the latter being equivalent to about 16 US dollars), or the wage increases for workers in the public sector in 2019. Basic operating modes of the payment and material stimulus systems within the state enterprise system have been redefined in the Resolution No. 6/2016 of the *Ministry of Labour and Social Security (MTSS*) and Resolution No. 19/2017 of the *Ministry of Finance and Prices (MFP).* Galtés (2017: 99) counts among the advantages of these reforms that these eliminate administrative restrictions on wages and allow for simultaneous payment systems (piece-rate and performance-based), as well as for a certain degree of autonomy for state enterprises regarding the distribution of wages. At the same time the author criticizes, among other things, that the resolutions generalize salary penalties and that the distribution of wages among the workers is deregulated and left to the managers of the firms. She also criticizes that the formal requirement of the participation of workers and unions in the annual approval of payment systems is not granted in reality.

To better understand these remarks, it is important to note that the wages of many employees in state enterprises are divided into a basic wage and a so-called *stimulus* (*estimulación*), depending on the achievement of (mainly centrally) planned and defined indicators. The fluctuations in the stimulus (which may change monthly, in a range between zero to three times the basic wage of a worker) represent a major uncertainty for workers. Díaz/Echevarría (2017: 234-235) stress that sanctions, in the case of non-achievement of the indicators (which are assessed at the company level and not individually), collide with one of the basic principles of the conception of salary payments.[19] This principle notably conceives of salaries as the expression of the quantity, the quality of, and the time dedicated to work. Referring to Resolution No

[17] Here, the term "average incomes" seems to refer primarily to (state) wages, although it is not clear whether food rations are included (see Bye 2020: 101).

[18] Based on average and minimum wages for the year 2016, namely 740 CUP (average wage) and 225 CUP (minimum wage).

[19] Articulated, for example, in the Cuban Labour Code (Asamblea Nacional del Poder Popular 2014: 454).

138/2017 of the *MFP*, these authors also criticize that the income of the workers is being sanctioned in a twofold manner (via salaries and via stimuli) in the case of non-achievement of the indicators. They further note that workers do not actively participate in the determination and approval of these indicators and critically highlight that compliance with the indicators does not always lie directly in the hands of the firms, and even less so in the workers' hands.

The previous reflections on the question of decent wages in contemporary Cuba only tackle some main issues relating to wages in the state sector. Although these are closely linked to wage and income-related issues in other sectors, and although some steps have been taken in recent years to regulate wages in the non-state sectors of the economy, many observers criticize that there are still major gaps in this area. As Galtés (2017:65-67) notes, the current labour code and corresponding legislation and resolutions provide, to some extent, norms for wage guarantees and social protection of workers in non-state areas. Nevertheless, she also stresses that the setting of salary levels in these areas does not follow the same rules as the state sector and is perceived to be much more flexible and less regulated, eventually resulting in a widening of the gap between state salaries and incomes from other sectors. This equally applies to social protection issues. Yet, it is difficult to assess the question of decent wages in some parts of the non-state sector, especially due to a lack of data. We, therefore, confine ourselves here to highlighting the gaps between the state- and non-state sectors, as well as the important loopholes in the promotion of decent wages in the informal economy.

Nonetheless, we hopefully managed to illustrate some of the contradictions of the Cuban model outlined in the previous sections. Indeed, fair wages and income from work, as well as legislation on minimum wages (as stipulated by the ILO's criteria to realize decent wage conditions) have been promoted in Cuba since the beginning of the Cuban revolution and are emphasized in the political discourse as part of the current reform process. However, as wage policy – like other areas of employment policy – faces the contradictions inherent in the conception of the Cuban production and property systems, it presents important deficiencies and does not guarantee a real appropriation of the wealth generated by the workers. Before moving on to a general conclusion on this matter, we will shortly address the topic of gender equality in the context of this contradiction.

Gender equality measures

In order to apply a "gender equality lens" (ILO 2008: 1) and to assess *womens'* work opportunities and working conditions in Cuban labour policies and realities, we will, in the following, first examine issues of decency (or indecency) of female work in a more narrow sense of core labour standards in the so-called *productive sphere*. Second, we will refer to a broader conception of the notion of decent work and take a short look at unpaid labour in the so-called *reproductive sphere*.

Gender equality is said to be a major objective of Cuban politics since the early years of the revolution in the 1960s. It is anchored in the Cuban Constitution (Constitución de la República de Cuba 2019), as well as in labour, social and family legislation and policies. According to the OECD's Social Institutions and Gender Index (OECD 2014a), which addresses *de jure* and *de facto* situations of discriminatory social institutions, Cuba is among the countries with very low levels of gender discrimination in social institutions. However, if we look at female labour force

participation in the realm of paid work, official numbers on the employment gender gap in Cuba are very similar to the global gender gap,[20] with 49.5% of Cuban women employed, compared to 76.9% of Cuban men (ONEI 2019).[21] In the Cuban state sector, women are still relatively well represented (1.404 million women of the total 3.067 million labour force in 2018; see ONEI 2019). The proportion of highly qualified women in different areas and professions of the state sector is described as relatively high, and their representation in political and other important decision-making functions is often emphasized.[22] Nonetheless, Cuba is not completely exempt from the phenomenon of gendered *occupational segregation,* as patterns of educational choices seem to suggest: to date, Cuban women are over-represented in so-called social courses of study and less oriented towards technical and agricultural careers (Echevarría et al. 2019).

As described above, the current developments in Cuba come along with new tensions and problems regarding occupational security, wages, and social protection – and women are particularly affected by these developments. Taking the example of the layoffs in the state sector in the past decade, Lara Junco (2015) notes that between 2010 and 2013, the Cuban state dismissed almost 62,000 women, compared to about 4,000 men. Echevarría/Tejuca (2017: 155) mention a slightly lower number of female workers dismissed from the state sector between 2010 and 2014, namely 51,000. As recent numbers of women's share in the non-state sector show (254,700 women, compared to 1.416 million men in 2018; ONEI 2019), the female labour force coming from the state sector has been absorbed less by the non-state sector than the male labour force.

Nonetheless, especially in the often-discussed area of *cuentapropismo* (self-employed people and owners of small businesses), women's labour participation has been increasing (from 152,000 in 2015 to 197,200 in 2018; ONEI 2019). Assessing decent working conditions in this area of the Cuban economy seems particularly difficult, since it is possible to conceive of *cuentapropismo* as both a potential for the Cuban economy and, due to a persisting lack of regulation, a threat to basic labour standards and social protection of workers. The return of paid domestic work in Cuba (e.g. Romero 2016; 2019) may serve as an illustration for this, especially with regard to gender-related issues. Historically, after the takeover of the revolutionary government in the 1960s, paid domestic work was frowned upon and almost completely abolished, due to its entanglement with class, gender and racial discrimination. With the rise of *cuentapropismo* in Cuba at the beginning of the 21st century, there seems to be a resurgence of paid domestic work. As is often the case for activities in the area of self-employment and small businesses in Cuba, the sociodemographic composition of domestic workers is quite diverse and also includes highly qualified women, which is generally perceived as a major threat in terms of brain drain and occupational downgrading. Admittedly, seen from a different angle, many of today's domestic workers find themselves in a relatively good economic situation and enjoy a certain

[20] The current global labour force participation is estimated to be about 49% for women and 75% for men (ILO 2018a).

[21] Referring to a working age population of women between 17 and 59 years, and men between 17 and 64 years.

[22] Based on national statistics (ONEI 2019; FMC 2016), Echevarría, Rojas and Tejuca (2019) highlight, for example, that more than 70% of federal prosecutors, presidents of provincial courts and professional judges are female; and that 53,3% of jobs in the areas of science, innovation and technology are occupied by women, as well as 47,2% of higher management positions. According to UN Women (2019), in 2019 the proportion of women in Cuban parliament was 53,2% – the second highest worldwide.

degree of autonomy, which they might not have exercising their original profession, at least not in Cuba's current labour context.

Yet, generally speaking, one of the features of *cuentapropismo* seems to be the reinforcement of a division into so-called typically female and typically male working activities, which often involve particularly vulnerable working conditions for occupations labelled as typically female (Echevarría et al. 2019). In addition, to date there are more women who do contract work than there are female entrepreneurs – a major explanation for this is women's limited access to seed capital, compared to men's resources of getting such capital (Díaz/Echevarría 2016). As mentioned before, regulation in the area of *cuentapropismo* remains at a relatively low level, while the precariousness of many activities in this area remains relatively high – with particular deficiencies regarding women's labour, such as lacking rights to paid rest or unpaid leave due to family problems; or even the denial of the right to return to work after maternity leave (Echevarría et al. 2019).

The Cuban legal framework indeed provides basic institutions that should protect working women and ensure gender equality, such as the maternity – and paternity – leaves that *should* be guaranteed after the birth of a child. By law (Consejo del Estado 2017), working mothers have the right to a pre-natal leave of six, and a post-natal leave of twelve weeks (with a full wage substitution, calculated from the average weekly income from wages received in the twelve months preceding the maternity leave). After that, until the child reaches the first year of life, mothers can either choose to return to work or to care for the child with a wage substitution of 60% and a job guarantee for the child's second year of life. This leave for early childcare can also be taken by the father. In reality, however, the implementation and realization of these institutions and protection measures must be regarded under the circumstances already discussed above: the regulations apply mainly to the state sector, in which wages are relatively low and are considered to be insufficient to cover costs of living. In other sectors, the regulation and implementation of these institutions seldom exist. It must also be noted in this context that despite the long tradition of promoting gender equality and women's empowerment in Cuba, *machismo* remains persistent in Cuban daily life.[23] The number of Cuban fathers who actually take leave for childcare is said to be quite low; some Cuban families might not even know about this possibility.[24]

In Cuba (as in most parts of the world), women continue to perform a majority of the work in the so-called *reproductive sphere*. According to the OECD (2014b), Cuban women devote about three times as much time to unpaid care work as men.[25] Indeed, in international

[23] For a recent inquiry on machismo (understood as a specific form of patriarchy, mainly in the Latin American and Caribbean context) in contemporary Cuba see, e.g., Fox & Zagumny (2017). The authors state that traditional Cuban gender roles, expectations and responsibilities continue to manifest in Cuban society, particularly in every-day social interactions and child education.

[24] Unfortunately, we could not find much precise information on this matter. According to UNICEF (2019), between 2003 and 2014, only 125 Cuban fathers took paternity leave. A survey carried out by the Ministry of Health in 2014 (N = 9958 Cuban households) showed that only 18% of fathers had recently participated in four or more educational activities of their children (aged between 36 and 59 months), compared to 76% of the mothers (MINSAP 2015). Qualitative research on the matter highlights a persistent traditional division of roles into *providing father* and *affective mother* (Da Silva/Guerra 2012: 101).

[25] This number certainly needs to be regarded as a conservative estimate and may only serve as a rough indication, since, unfortunately, there is not much reliable data on the gendered division of labour in Cuba.

comparisons, Cuba is considered to have high enrolment rates in early childhood care and education and is among the countries that have relatively low care dependency ratios (ILO 2018b), which may be interpreted as a certain easing of women's workload. However, Cuban women's *double burden* of paid and unpaid work also needs to be seen in a context of recurrent economic crises, environmental shocks and scarcity, in which family and domestic chores are highly labour-intensive. To give just one example of research on this matter, Davidson and Krull (2011) have observed a reinforcement of the gendered division of reproductive labour (particularly regarding chores related to food acquisition) in post-Soviet Cuba. Interestingly, the authors note that this gendered division also appears to be reflected in a reinforced and shared discourse on the supposed expertise of women in domestic work. This, in turn, seems to be backed up by the changing policy framework of the past decade, which represents new challenges regarding questions of – paid and unpaid – decent work for women, since the current reform process also seeks to reduce state subsidies and welfare services. It is worth noting that this contrasts sharply with the projected ageing of the population (comparable with demographic developments in so-called first-world countries), which raises the question of *who will care* for these elderly.[26] Echevarría et al. (2019) note that these demographic challenges have led to recent policies aiming to raise birth rates and reinforce women's social function in the reproductive sphere. To end this chapter with the words of these authors, in Cuba

> *paid work is still conceived of as the only work that is valued […]. This conception explains the scarcity of measures aimed at promoting more equitable gender relations, in which the reproductive space is promoted as an important space for the development of a country. (Echevarría et al. 2019: 153)*

Conclusion

The previous examination of labour policies and realities in Cuba has shown that the promotion of principles associated with the Decent Work Agenda is a necessary, but not sufficient prerequisite to realize conditions of decent work. In the analysis, our goal was to highlight the relations of labour, production and property in the Cuban development model and the resulting (im-)possibilities for workers to appropriate their work and the wealth it generates. Furthermore, we addressed some of the institutional logics and problems these relations are based on; as well as the general conception of work that underlies Cuban labour institutions and policies.

As we have attempted to show, Cuban social and labour policies are, until today, based on a socio-economic development model in which *social* property takes the form of *state* property. Historically, this model has generated a set of principles, relationships and social and labour policies that seek to propose an equitable appropriation of work (and the wealth it creates) by the workers. However, the current reality of Cuban labour relations and working conditions hardly conforms to this claim. The transformation processes related to the crisis of the 1990s (and its long-standing repercussions and follow-up crises), as well as the strategies designed to face this crisis have led to important institutional loopholes that eventually complicated the system of Cuban labour relations and contributed to the precarisation of working conditions

[26] Especially since social security is not very well developed in the area of long-term care in contemporary Cuba.

(including the remuneration of work) in both the state and the non-state sector. In other words, the socio-economic developments of the past decades and the reforms designed to face them, especially the so-called *update of the Cuban socio-economic model,* have, to some extent, altered Cuban relations of production and property. The state has gradually contracted and retreated as an economic actor in areas where new actors and economic sectors have gained importance.

However, the existence and legitimization of other forms of property than state property and the emergence of new actors in Cuban labour relations have not been covered by sufficient changes in institutions and policies. Conditions for social dialogue between the fundamental actors of Cuban labour relations continue to be problematic, which, in our opinion, represents both a major source of contradictions and an obstacle in the fight against the precarisation of work. Particularly the lacking possibilities for workers' participation in execution and decision-making processes appear to be an important obstacle for the maintenance or creation of decent working conditions. This is also reflected in contemporary discussions on Cuban wages, as discussed in this article's section on Cuban wage policy. Moreover, the strong ideational emphasis of the Cuban development model – and its *update* – on economic development seems to nourish a general conception of work that understands it primarily in economic or commercial rather than in social terms. Particularly the example of women's working conditions and unpaid household and care work seems to substantiate this assumption.

In this respect, Cuba hardly differs from tendencies in other countries around the globe. It appears that the criticism pointing out the ILO's lacking critical stance on the commercialization of labour discussed in the introduction of this article is equally relevant for the Cuban context. Therefore, we would like to emphasize, once again, the importance of such a critical stance when assessing labour policies and realities (in terms of their potential to create and maintain decent working conditions) in any context, also beyond the Cuban case. In our analysis, we stressed the elements of labour and property relations, wealth appropriation, institutions and their (historically formed) logics, as well as ideational and conceptual foundations – such as the conception of work underlying development models and policies. We suggest that these elements can be used as tools for a critical analysis of social and labour policies and can thus be an important complement to other evaluation tools of the Decent Work Agenda.[27]

To conclude, we briefly reflect on some general approaches that could provide a sound basis for decent working conditions in Cuba and that would respond to the challenges discussed in the previous chapters. In our opinion, there is a need for a new regulatory framework that better responds to and involves all actors of the socio-economic system. Mechanisms of economic and political management and action should be adjusted to the new reality and culture of work in contemporary Cuba, which would also require a readjustment of labour organization and execution based on decades of thinking and working within centralist budgets. Further, a revolutionary transformation of the prevailing model of labour relations is necessary, including the generation of new forms of enterprise and labour organization in the state sector that allow for a more participatory model of labour relations. This would require the adoption of a company law that recognizes the decisive authority of workers in the state sector. In the non-state sector, the problematic existence of private economic actors that distance themselves more and more

[27] E.g., the *Toolkit for Mainstreaming Employment and Decent Work* (ILO 2008); or other assessment tools developed in international and national frameworks.

from the (generic and almost euphemistic) category of *self-employed workers* should be addressed. Workers in the area of *cuentapropismo* should be made visible as legal entities and as social subjects with very particular socio-productive logics. This would also contribute to the generation of a new model of labour representation and syndicalism that surpasses the existing model of labour relations and that can represent the multiplicity of interests emerging in the consolidation process of a mixed economy.

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2.2 Article B: The "Economic Battle" Now and Then: (E)valuation Patterns of Distribution in Cuban State-Socialism

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The "Economic Battle" Now and Then: (E)valuation Patterns of Distributive Justice in Cuban State-Socialism

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Abstract

This article disentangles and explores some commonly made assumptions about *egalitarian state-socialist ideologies*. Based on the conceptual framework of the multiprinciple approach of justice, it presents the results of an in-depth analysis of (e)valuation patterns of distributive justice in Cuban state-socialism. The analysis mainly focuses on ideational conceptions of distributive justice *(just rewards)*, but it also accounts for distribution outcomes and resulting (in)equalities *(actual rewards)*. The results of the comparative case study of the Cuban framework of institutions and political leaders' views in two periods of time, the early 1960s and the 2010s, point to (e)valuation patterns that are generally labelled as *egalitarian*, such as the allocation rules of outcome equality and (non-functional) needs. However, contrary to common assumptions about egalitarian state-socialist ideologies, the results also point to several other patterns, including equity rules as well as functional and productivist allocation rules. I argue that many of these (e)valuation patterns, in their connection to the discursive storyline of the Cuban *economic battle,* are indeed compatible with *egalitarian state-socialist ideology.*

Keywords Distributive justice · Multiprinciple approach · (E)valuation patterns · Ideology · State-socialism · Cuba

Introduction

With the fall of the Berlin wall by the end of the twentieth century, the sociology of justice has seen a rise in studies in the field of comparative attitude research (Liebig & Sauer, 2016). Many of these studies that examine differences in attitudes towards income inequalities, occupational hierarchies, and redistribution include a "Communist variable" (Kelley & Evans, 1993) to test for "the role of Communism"

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(Alesina & Fuchs-Schündelin, 2007) or "the influence of communist history" (Kulin & Meuleman, 2015). Roughly speaking, hypotheses linked to such variables assume that differences in individual attitudes towards distributive justice can be attributed to specific characteristics of (former) (state-)socialist and (market-)capitalist societies, respectively. This often includes the assumption that in countries that formerly belonged to the so-called communist bloc, people are critical towards large inequalities because of a "dominant ideology of equality (i.e. egalitarian, non-functionalistic, non-meritocratic views)" (Hadler, 2005, p. 136). We find similar considerations in everyday conversations, mass media, and in academic reflections on social justice, also regarding (allegedly) opposite ideologies in (market-)capitalist societies. Schumann (2001), for example, identifies the allocation rule of contribution and preferences for economic incentives (reflected, e.g. in pay-for-performance systems) as proprietary characteristics of a capitalist approach to distributive justice. In the socialist approach, in turn, "incentives are thought to be corrosive to the well-being of members of society. Instead, the socialist points to the importance of abilities and needs" (Schumann, 2001, p. 102).

Culturalist approaches such as *(dominant) ideology theory* (e.g. Abercrombie & Turner, 1978; Kluegel & Smith, 1986) presume, explicitly or implicitly, a common societal or cultural heritage in the form of values, beliefs, and attitudes. Generally, this presupposes the existence of a more or less homogenous framework of institutions and political leaders' and/or elites' views, which influence individual attitudes. However, in comparative attitude research, descriptions of such frameworks are often limited to short references regarding, for instance, destratification policies favouring blue-collar workers (e.g. Gijsberts, 2002) or low wage spreads (e.g. Alesina & Fuchs-Schündelin, 2007) in (former) state-socialist countries. Kelley & Zagorski (2005, p. 352) speak of **"**the ideological egalitarianism of Communism, its sustained propaganda for equality, and very low levels of actual inequality in Communist society". Ignácz (2018, p. 4) states that "most socialist regimes kept income inequality to a relatively low level" and that "regimes typically communicated egalitarian ideology". As a result, the dissolution of the Soviet Union and the transition processes in these societies are presumed to have caused *shifts* in these ideologies, leading researchers to suppose, for example, that "the renunciation of the official communist egalitarian ideology will have induced a shift towards an ideology of rewards for achievement" (Gijsberts, 2002, p. 282).

Empirical results (e.g. Evans & Kelley, 2018; Kelley & Zagorski, 2005; Kreidl, 2000) have questioned the ability of culturalist approaches such as (dominant) ideology theory to explain individual justice evaluations. As Hadler (2005, p. 135) points out, "one doubt [regarding the ideology thesis] concerns the statement that elites are able to convey their views to the population". However, the assumption that elites' views and institutional frameworks in state-socialist contexts were or are of a predominantly egalitarian, non-functionalistic and non-meritocratic character seems to be less discussed. This is why, in this article, I propose to explore this assumption, notably by using the example of the Cuban framework of institutions and political leaders' views.

Interestingly, debates on Cuban state-socialist ideology are characterized by conjectures similar to the above-discussed. The Caribbean island has, until today,

formally remained a constitutionally socialist state with a mainly state-led and centrally planned economy. Nevertheless, the dissolution of the Soviet Union and the deep economic crisis that subsequently plagued Cuba are often depicted as an important turning point regarding both actual distribution and ideational conceptions of distributive justice in the country. The crisis of the 1990s is said to be the origin of important changes in socio-economic stratification, characterized in particular by growing inequalities. At the same time, observers notice changing directions in the Cuban government's "post-Soviet economic policies that challenged Cuba's egalitarian project" (Gordy, 2015, pp. 5–6). Especially the most recent and ongoing reform process, the so-called *update of the socio-economic model*, which also coincided with changes in political leadership (most importantly the presidential changes from Fidel to Raúl Castro in 2008, and from Raúl Castro to Miguel Díaz-Canel in 2018), is said to be accompanied by a "new understanding of socialism" (Ritter & Henken, 2015, p. 2). Many observers contend that, although *social justice* still seems to be an important key word of Havana's official revolutionary rhetoric, its ideational content may have changed over the past decades.

Among frequently mentioned illustrations for this are the repeated critiques of the Cuban state wage system, voiced not only by the general public but also by the government (that has adopted several wage reforms in recent years). According to Domínguez (2017, p. 2), the political course initiated by former president Raúl Castro and its accompanying rhetoric also suggest that "something is new and different with regard to social policies: their aim is to provide Cuba with "an efficient and sustainable system," not merely to promote justice in our time". In summary, observers contend that there is a growing ideational emphasis on (economic) performance criteria, material progress, and efficiency in Cuban discourses and policies (e.g. Bye, 2020; Gómez, 2014; Hoffmann, 2016). Such observations are then often contrasted with the perception of a more egalitarian design and rhetorical framing of social and labour policies as they were set out at the beginning of the Cuban revolution[1] in the early 1960s. Social development, the (alleged) previous focus of the government, would now, in contemporary Cuba, be merely conceived of as "a 'derivative' of economic development" (Echevarría et al., 2019, p. 153, my translation).

However, parts of the literature on the history of the Cuban revolution suggest that changing emphases of policy approaches and political ideology could be observed much earlier than at the end of the twentieth century. According to this viewpoint, Cuba has, since the early days of the revolution in the 1960s, "experimented with multiple models of economic organization and development strategies" (Mesa-Lago, 1994, p. 9, my translation). This included "seesaws in economic and labor policy" (Farber, 2011, p. 140) which, in turn, have not been framed by one uniform, but by various and sometimes even rival conceptions of distributive justice and allocation rules. In this article, I follow-up on this viewpoint by linking it to the multiprinciple approach of justice. This approach assumes the existence—and

[1] The Cuban revolution is generally conceived of as a process, rather than a one-time event. Although this perspective may be debatable (see, for instance, Gropas, 2007), it will be adopted in this article for the sake of convenience.

possible co-existence—of different allocation rules and contends that such rules can be interpreted differently in different (cultural) contexts, i.e. be further specified in various sub-rules, as will be explained in the next section.

With the exploration of (e)valuations of distributive justice in Cuban institutions and statements of political leaders, I intend to contribute to social justice research by applying and extending already existing "maps"—as Bank (2016) calls it—of (e)valuation patterns of distributive justice to the Cuban case. This hopefully allows to disentangle, elaborate, or correct some of the above-discussed assumptions in both international and Cuban-specific research.

Conceptual Considerations

The assumption that (former) state-socialist societies were or are characterized by an *egalitarian ideology* generally refers to different conceptual levels. In the comparative attitude studies discussed in the introduction, egalitarian individual ideologies are assumed to be influenced by a corresponding egalitarian framework of institutions and political leaders' views. Regarding the latter, the studies in question often refer to both ideational conceptions of distributive justice in this framework (e.g. by using keywords such as *regime* or *state ideology*) and actual outcomes of distribution (which, in state-socialist societies, are generally assumed to be characterized by low levels of income inequality, low wage spreads and greater rewards for blue-collar workers). To examine Cuban state-socialist ideology, I will thus concentrate, in the following, on (e)valuation patterns of distributive justice in both institutions and political leaders' views. I use the term *(e)valuation patterns* following Lamont's (2012, p. 208) considerations that "valuation practices (giving worth or value) and evaluative practices (assessing—how an entity attains a certain type of worth)" consist of different sub-processes of categorization and legitimation. The theoretical distinction between *just rewards* and *actual rewards* provided by Jasso et al. (2016) allows to separately approach the levels of ideational conceptions of distributive justice on the one hand, and distribution outcomes and resulting (in)equalities on the other.

As also discussed in the introduction, the assumption of *egalitarian state-socialist ideology* is often linked to several additional conjectures. Firstly, assuming the dominance of egalitarian (e)valuation patterns in institutions and political leaders' views generally implies the conjecture that these are characterized first and foremost by the allocation rules of outcome equality and/or need. Secondly, it is often explicitly or implicitly assumed that *egalitarian ideology* is contrary to or incompatible with the allocation rule of equity (also referred to as contribution-, merit-, achievement-, or proportionality rule). Thirdly, we have seen that state-socialist *egalitarianism* and its underlying allocation rules are often perceived to be purely normative or non-functionalistic (e)valuation patterns. This means that an allocation rule, for instance, is presented as an "intrinsically valued goal", i.e. as an end in itself and not as "a strategy for the attainment of other ends" (Törnblom & Kazemi, 2015, p.

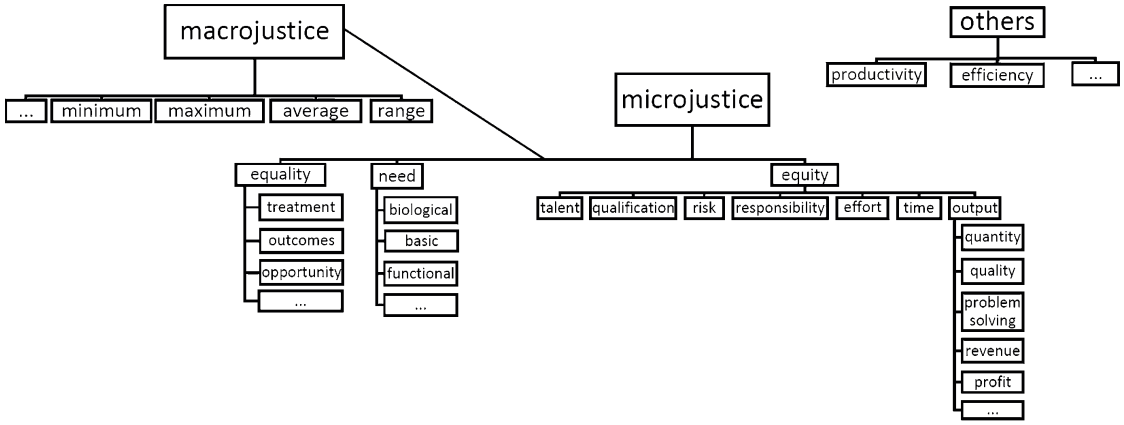

Fig. 1 Allocation rules

22, referring to Van Avermaet et al., 1978).[2] Fourthly, societal changes in the framework of transformation processes—such as those that took place after the fall of the Berlin wall—are assumed to be accompanied by changes in (e)valuation patterns of distributive justice. This is often expressed in the conjecture that, broadly speaking, transformation processes in former state-socialist societies are accompanied by a transition from *egalitarian* to *equity* logic. In the debates on Cuban transformation processes we also find the conjecture of an increasing incidence of *economistic* or *productivist* (e)valuation patterns.

In order to examine these assumptions more closely with respect to the Cuban case, I rely on insights and concepts developed in the framework of the multiprinciple approach of distributive justice (also referred to as the contingency or classification approach, see Törnblom & Kazemi, 2015, p. 25). Since a wide range of scholars has contributed to the development and evolution of this approach, I refer, in the following, to the comprehensive overview of concepts and former empirical results provided by Törnblom and Kazemi (2015). I use the basic conceptual distinction between the allocation rules of equity, equality, and need to approach (e)valuation patterns of distributive justice in the Cuban framework of institutions and political leaders' views. Hereby, I consider that these three principles can take different shapes or configurations and that they can be further differentiated into various sub-rules. Additionally, I account for other allocation rules, which are not considered to be distributive justice rules per se but are linked to issues of distributive justice. Moreover, especially when it comes to discussing so-called *state ideologies*, it seems helpful to distinguish between "microjustice (the fairness of rewards to individual recipients) and macrojustice (the aggregate fairness of reward in a society)" (Brickman et al., 1981, p. 173). There are several theoretical and empirical attempts in the tradition of distributive justice research to summarize and sort rules and subrules of allocation. I started from some of these already existing "maps" (mainly referring to Bank, 2016; Brickman et al., 1981; Törnblom & Kazemi, 2015; Vietze, 2018; Voswinkel & Kocyba, 2008), which are summarized in Fig. 1, as sensitizing

[2] These authors actually distinguish between consummatory and instrumental functions of justice.

concepts for the analysis. In the course of the analysis, these concepts were adapted and extended for the Cuban case.

Empirical Proceeding and Data

Based on the above-described assumptions regarding state-socialist egalitarian ideology, the initial overarching research question for the empirical analysis of the Cuban case was as follows: *Which (e)valuation patterns of distributive justice are prevalent in the institutional and discursive framework of Cuban state-socialism in different time periods?* To approach this question, I mainly referred to the interpretive analytics and methodological tools of the Sociology of Knowledge Approach to Discourse (Keller, 2006, 2013). With an extensive *discourse field exploration* based on *contextual literature*,[3] *exploratory interviews*,[4] and *discourse fragments*[5] I aimed at getting a comprehensive overview of documents dealing with distributive justice in the realm of work and welfare since 1959. An initial data corpus contained 429 documents from the period between 1959 and 2019 that I considered particularly informative regarding the above-mentioned research question.[6] This data corpus was then successively reduced based on theoretical sampling procedures (particularly procedures of minimum and maximum variation, accompanied by constant comparisons between different discourse fragments) and the insights gained from the field exploration.

Further, in-depth analyses and coding procedures focussed on two periods of time, which I refer to as *the foundation of the socio-economic model in the early 1960s* and *the update of the socio-economic model in the 2010s*. Both periods are particularly revealing regarding (e)valuation patterns of distributive justice in the Cuban framework of institutions and political leaders' views. The early 1960s can be understood as a period in which the revolutionary government created the foundations of a new "system" of distributive justice in Cuba (including important political debates and decisions regarding property, wages, and welfare). As discussed in

[3] I employ the term *contextual literature* for sources that I used for an introductory, informative analysis. These sources mainly consist of academic and popular literature on the history of the Cuban revolution and its socio-economic policies. Note, however, that the conceptual distinction between contextual literature and discourse fragments (see footnote 5) may, in the "practice" of discourse analysis, not always be clear, as contextual literature may also be part of the discourse that is analysed.

[4] Five guided, half-structured interviews conducted with academics of the University of Havana in January/ February 2018. Note that, like the contextual literature, the interviews may also be considered as discourse fragments.

[5] A discourse fragment is a "[s]tatement-event (utterance) in which discourses are more or less comprehensively actualized (e.g. a text); [it is the] principal database for analysis" (Keller, 2013, p. 73).

[6] This somewhat less systematic approach was adopted particularly in view of the long time span (and the resulting multitude of corresponding documents) considered at beginning of the analysis. Thus, to a certain extent, sampling procedures rely on the researcher's (subjective) considerations and interpretations. Yet, as explained, these are based on a thorough exploration of the discursive field, and oriented towards the guidelines on corpus building and the selection of data provided by Keller (2013, pp. 95–101).

the introduction, the update of the socio-economic model, which can be more or less ranged in the 2010s, is said to be one of the most—if not the most—substantial reform processes since the beginning of the revolution. Thus, analysing and contrasting these two periods allows, on the one hand, to grasp a broad range of possible (e)valuation patterns of distributive justice at two decisive points of time in Cuban history. On the other hand, it also allows, to a certain extent, to address possible configurations, i.e. continuities or changes of these patterns over time.

The orientation towards these two periods enabled the sampling of *key texts and passages*[7] for the in-depth analysis of discourse fragments. The 108 textual documents that were retained can be roughly divided into two types: On the one hand, I analysed speeches and statements of *key actors* holding leading positions in the Cuban government (which, in the following, I will mainly refer to as *political leaders*). On the other hand, I also addressed institutionalized (e)valuation patterns in legal texts, policy- and action programmes, party resolutions and national statistics. Additionally, I consulted the contextual literature and exploratory interviews for the assessment of actual rewards, as will be explained below. For the reconstruction of (e)valuation patterns of distribution, I referred to methodological proposals of Grounded Theory (Corbin & Strauss, 2008),[8] adapted for discourse analysis (see Keller, 2013). Codes were assigned to text passages that gave answers to the overarching questions *"Who should get what and why"* and *"Who gets what and why"*, using the above-described sensitizing concepts. Note that all documents were analysed in their original language. All translations in the presentation of the results in the next sections are my translations.

Analysis

The following sections discuss the results obtained from the in-depth analysis of discourse fragments of the above-described periods: *The foundation of the socio-economic model in the early 1960s* and *the update of the socio-economic model in the 2010s*. The main focus of the analysis is placed on *ideational conceptions*, i.e. ideas of just rewards, targeted or desirable distribution outcomes, and justifications of (in) equalities. Nonetheless, some sections also include context descriptions and short assessments of actual rewards and distribution outcomes as they are depicted in the contextual literature.

[7] Key texts and passages can be understood here as particularly dense, relevant and informative texts with respect to the research questions, and as containing typical or exemplary statements. They were selected according to their density of information and/or their potential to represent further discourse fragments.

[8] That is, the ideas of open, axial und selective coding, as well as memos and commentaries.

The Early 1960s: Founding the Socio-Economic Model

As much of the contextual literature on Cuban history describes, after the revolution had overthrown the Batista regime in 1959, the revolutionary government took control over major parts of the Cuban economy in the early 1960s. This included the nationalization of the country's main means of production as well as the introduction of central planning and price controls. As different sources in the contextual literature further describe (e.g. Farber, 2011; Mesa-Lago, 1994; Mesa-Lago & Pérez-López, 2013; Yaffe, 2012), the opinions of the revolutionary leaders on *how* societal production should be organized and distributed were not always unanimous. Note, however, that the following subsections focus less on these disagreements within the so-called *great debate* (a topic that has been extensively covered in the literature) but more on describing (e)valuation patterns of distributive justice that prevailed during this period.[9]

Overall Distribution: Minimum, Need and the Economic Battle

In the early 1960s, answers to the question of how a just distribution in the revolutionary society (i.e. on the macro-level) should look like, generally remain quite vague. One of the patterns that emerges in different discourse fragments is the objective to fulfil minimum standards of biological and basic needs, particularly of formerly less privileged Cubans.

> [1] Now, we had to go and regulate it [the salary] again, so that the least, the less 'fortunate' let's say, those with the lowest wages and the most difficult conditions, could ensure minimum conditions.[10]

As shown by this quote from the then-minister of industries Ernesto "Che" Guevara in 1962, the objective to reach *minimum distribution standards* is used to justify state intervention in the form of balancing or equalizing measures (which in some cases include, for example, waiver requests addressed to Cubans whose situation is perceived as better off or privileged). Another type of statement from this period refers to ideas of an *ideal future distribution* that goes beyond the goal to fulfil the needs of the less privileged. We find this objective to increase the overall level of need satisfaction, for example, in the *1963 Social Security Act*:

[9] The reader may notice that Ernesto "Che" Guevara and Fidel Castro are quoted relatively frequently in this section. This should not give the impression that there was an ideologically homogeneous leadership at the time that unanimously espoused Guevara's or Castro's ideas. Yet, following Mesa-Lago (1971, 1994), Guevara and Fidel Castro count as "the two most important and productive leaders of the revolution" (Mesa-Lago, 1971: 536), and the "guevarist-castrist model" (Mesa-Lago, 1994: 127) prevailed in the second half of the 1960s. Against this background, the prioritisation of their views at this point seems justified.

[10] References to the quotes are provided in the *Appendix*.

> [2] The fundamental objective of the Socialist Society is to increasingly satisfy, in accordance with what the country's economic development allows, the material and social needs of the workers.

Very often, this conception of an ideal future distribution is linked to the argument that to realize this *fundamental objective of socialist society* in the future, the top priority at present is to increase national production, productivity and efficiency. In many discourse fragments, economic development is emphasized as a key solution to a wide range of social problems, , e.g. unemployment, poor medical care, and malnutrition. Such problems are generally seen as results of the flaws of capitalism. In this context, economic production is also depicted as a part of the *fight* for Cuban sovereignty and against US imperialism:

> [3] the year 1961 has been a year of important triumphs, not only in the way of the armed defence, in the sector of the armed defence of our sovereignty but also – and perhaps with as much importance as in the other aspect – of the vigilant defence, by means of the production, of our sovereignty.

The framing of economic production in military terms is a recurring pattern in various discourse fragments. Often, it serves to establish a rhetorical connection between the emphasis on economic development and the defence of the national territory. Indeed, in the course of the analysis, I identified the pattern of *(winning) the economic battle* as a central storyline[11] in the Cuban leadership's discourse on distribution and distributive justice. The term is an *in-vivo code*[12] that is used in various statements of both the early 1960s and the period of the update of the socio-economic model. Although the *economic battle* does not embody a distributive justice rule per se, it is closely linked to issues of distributive justice and conceptions of just rewards. In the early 1960s, for example, the importance of winning the *economic battle* is frequently used as an appeal to the Cuban population—or certain parts of it—to make sacrifices in the present and to renounce present advantages in order to benefit from (greater) advantages in the future. Thus, this economistic or productivist pattern can even serve to justify equalizing measures, i.e. measures that follow the idea of equal just rewards and/or result in—more or less—equal actual rewards.

As pointed out by Mesa-Lago (1994) and Mesa-Lago and Pérez-López (2013), it is difficult to assess how these objectives of overall distribution materialized in actual rewards and (in)equalities in the early 1960s, particularly due to missing data. However, as is also noted by other sources in the contextual literature, overall poverty and income inequalities decreased, indicating an "impressive redistribution of income in the first four years of the Revolution" (Mesa-Lago, 1994, p. 41).

[11] According to Keller (2013, p. 73) a storyline is a "common thread of a discourse by means of which the different constituents of the interpretative repertoire are interconnected".

[12] Corbin & Strauss (2008, p. 65) define an in-vivo code as a term that comes out directly from the data, "rather than being named by the analyst".

The Prerequisite of Hard Work and the Conception of Rewards as Incentives

In the course of the analysis, two overarching patterns were found to be closely linked to the question of how to win the *economic battle* and to realize intended distribution goals: the *constraint* or *prerequisite of hard work* and the *conception of rewards as incentives.* Most of the discourse fragments that provide answers to the question of "who should get?" are, implicitly or explicitly, related to the category of the worker: in the revolutionary (and socialist) society, people are entitled to rewards because they are, were or will be workers who contribute to societal production. The fundamental importance of hard work of each and everyone is, so to speak, upstream to all distribution issues. This is also reflected in the conception of social security as it figures in the above-cited *1963 Social Security Act*. Beneficiaries are entitled to social protection because they, or at least their kin, are contributing to the revolution's *economic battle*. As we will see in the next section, even social rewards that present a high degree of decommodification (such as rewards distributed through the rationing system), are not completely disconnected from the *prerequisite of hard work.*

In this context, the use of another sub-rule of need emerges, namely the rule of *functional needs.* This (non-self-referential) rule is expressed in the idea that workers' needs should be fulfilled for them to be able to provide the hard work required to win the *economic battle*. The following reflections made by the then-prime minister Fidel Castro on the role of vacations serve as an example:

> [4] It is in the interest of the country, of the country's economy and the country's development that the workers get their vacations. And we must insist on that aspect, too, and organize them properly, providing all the facilities. […] the annual rest must be organized; and this will always be useful to the working class, and will be useful to the country, and will be useful to our economy.

Another pattern that can be understood as a functional pattern is the general conception of rewards in the institutional and discursive framework of the early 1960s. According to the contextual literature, one issue among the above-mentioned disagreements between Cuban leaders in the early 1960s was the *form* of rewards to be distributed, i.e. whether rewards should be predominantly *monetary, moral,* or *social.* However, what all arguments seem to have in common, no matter which specific form of rewards they defend, is that they conceive of rewards first and foremost as *incentives [estimulós]*. This will be further examined in the next sections.

Social Rewards—The Example of Supply Distribution: between Need, Equality, and Abnormality

In general, the contextual literature and the coded discourse fragments refer to two types of *social rewards* or *social incentives*. The first type is social policy benefits in the narrower sense, such as old age, maternity, or sickness pensions. Indeed, social policy benefits can also be perceived as belonging to the category

of monetary rewards, and thus, as a variation of workers' wages. The second and more "pure" type of social rewards is the free and/or subsidized goods and services that the revolutionary state started to provide to (parts of) the population in the early 1960s. The contextual literature generally highlights such goods and services provided in the areas of nutrition and everyday consumer goods, education, housing, health care, transportation, sports, culture, and communication. One may indeed argue that this second type of social rewards contains egalitarian elements, since, in their conception, they refer to the allocation rules of equality of treatment and/or equality of results, as well as biological and/ or basic needs. However, although many of these social rewards can be conceived of as universal and highly decommodifying rewards, they are seldom completely disconnected from the above-described prerequisite of hard work, i.e. the expectation for the beneficiaries to contribute to the *economic battle*.

Since the wide range of social rewards covering various areas cannot be discussed here, I will, in the following, focus on the example of *supply distribution* (which, in the contextual literature, is generally referred to as the *rationing system*). In March 1962, the revolutionary government passed the first law on the organization of a supply distribution system. This led, in 1963, to the introduction of supply booklets (called *Libreta de Abastecimiento,* in Cuba often simply referred to as the *Libreta)* recording the goods and quantities to be distributed to households.

> [5] It is the Revolutionary Government's duty to address this abnormal situation by organizing a form of distribution that results equitable [que resulte equitativa] and allows all zones of citizenship [a todas las zonas de la ciudadanía] equal access to everyday consumer goods [igual acceso a los artículos de consumo corriente], thus eliminating the distribution shortcomings that have arisen as a result of the situation described above.

As shown by this passage from the 1962 law, the conception of supply distribution refers to the allocation rules of equality of treatment as well as biological and basic needs. Interestingly, the form of distribution that should result from supply distribution is, in this context, not referred to as *outcome equality*, but as *equitable*. Furthermore, it shows that the target of achieving an equal (or equitable) distribution is not the only justification for the introduction of supply distribution. Another reasoning frame becomes clearer if we look at the paragraphs preceding the above-quoted passage. These paragraphs notably specify the *abnormal situation,* namely as a "situation of relative scarcity of certain items" that "has been used for anti-social and counterrevolutionary elements to speculate on some and encourage other campaigns aimed at promoting hoarding and encouraging consumer uncertainty". Since the abnormal situation is attributed particularly to "the brutal economic siege led by the US imperialism against the national economy", one can conceive of the introduction of supply distribution as part of the *economic battle*. Thus, both distributive justice and other patterns are present in the conception of supply distribution in the early 1960s. What we may note here in passing is that none of the analysed statements that justify the introduction of supply distribution regard it as a fundamental human right to an unconditional basic income.

Regarding *actual rewards* and *distribution outcomes* linked to supply distribution, Mesa-Lago (1994, p. 55) notes that between 1964 and 1966, "the extension of rationed items was an equalizer, but the rising prices of the growing black market had the opposite effect". Further implications of supply distribution for actual rewards will be discussed in the section that presents the period of the update of the socio-economic model.

Monetary Rewards—Wage Scales and Work Norms: Between Outcome Equality and Equity

As described by the contextual literature, in the early 1960s, the Cuban state had monopolized large parts of the economy and became the most important employer in the country: by 1963, about two-thirds of the Cuban working force were state employees (Mesa-Lago, 1994, p. 35). Integrating trade union action into governmental action had put a stop to collective bargaining in Cuba (see, for example, Hernández & Mesa-Lago, 1971; Farber, 2011). Gradually, the labour ministry introduced nationally unified wage scales and work norms, i.e. output standards and quotas defining production quantities and working time standards. This system of interconnected wage scales and work norms was supported even by political leaders who were said to be less in favour of monetary rewards. The following quote from Ernesto "Che" Guevara illustrates the perception of monetary rewards as a sort of necessary evil, a remnant of capitalism, which could, however, not be abolished immediately:

> [6] Salary, that is, money, measures the different qualifications of all those who receive something for working. Money also measures the spirit of work of each of those who work in their different qualifications. Money is the only measure that can encompass everything, and in the era of the construction of socialism, when mercantile relations still exist, we have to work with money.

In its conception, the system of wage scales and work norms can be considered as a border case between the allocation rules of *equality of treatment, outcome equality* (notably in the form of collectively shared profits), and *equity.* The first two rules are expressed in the idea of *equal pay for equal work*, or, as it is also described by the revolutionary leaders, in the payment of wages independently of economic sectors and/or firms (and their varying profitability). The then-minister of labour Augusto Martínez-Sánchez phrased it as follows:

> [7] [From now on], worker, you are going to earn according to your capacity, according to your work, and not depending on the profit of this or that enterprise, because … all of these enterprises are already yours, they belong to the people, and all workers must be equally evaluated.

This quote also shows that the system of wage scales and work norms contains the idea of *equity*, that is, the overarching rule of *distribution according to contribution*.

In the following, I will briefly illustrate this what I call *(real)-socialist version* of the contribution rule by describing some of the categorizations and differentiations foreseen by the wage scales.[13] The system included four overarching scales for four types of occupation, namely: agricultural workers, non-agricultural workers, administrative employees, technicians, and executive personnel. Each of the four occupational scales then further differentiated between seven or eight wage grades. These grades referred to degrees of complexity and precision of the job, i.e. the skills required by the worker. The basic wage of the workers was determined according to these four scales and corresponding grades. For wages of workers falling under the same occupational scale and wage grade, wages could vary according to four factors: labour conditions under which the work was performed, over- or nonfulfillment of work norms, overtime payments, and the so-called historical wages. The latter represented an additional payment to workers whose wages were lower with these new wage scales than in the pay schemes before the revolution. The over- or nonfulfillment of work norms resulted in bonuses and maluses, respectively. However, as noted by Hernández and Mesa-Lago (1971, p. 229), wage bonuses corresponded to only 50 percent of the overfulfillment. Moreover, the bonuses had a ceiling: in combination with the worker's basic wage, they could not exceed the wage rate given to the next higher grade.

It is extremely difficult to assess *actual rewards* and resulting distribution outcomes linked to the introduction of wage scales and work norms. According to Mesa-Lago (1994, p. 36), it "helped to decrease salary differences (reducing particularly the income of the higher levels)". Hernández and Mesa-Lago (1971, p. 231) note that they generally agree with "the thesis that the introduction of wage scales was a step forward in favour of egalitarianism because it reduced the differences in income that existed at the time in Cuba". However, they point out that "certain qualifications are necessary" (ibid.): on the one hand, because of missing data (both from before and after 1959) and, on the other hand, because "extreme wage differences have continued throughout the period [of 1962–1966]" (ibid., p. 234). Regarding the latter issue, they further highlight persisting higher wages for technical and executive personnel that also enjoyed privileges, e.g. in the areas of housing, travel, and everyday consumer goods—which, under the Cuban conditions of general economic scarcity, may be highly valued. Incidentally, the analysis of the discourse fragments from this period showed how these privileges were justified—for instance, by highlighting their importance for winning the *economic battle*:

> [8] So this technician, then, must be given certain facilities. And many times, it is true: a person can even receive an apartment having less need than another, because the industry, the country, needs that person.

Moreover, wage differences also continued to exist, e.g. in sectors of the economy in which wage scales and work norms were not applied, or only to a limited extent

[13] As original data on this matter is difficult to find, I mainly refer here to the data of Hernández & Mesa-Lago (1971), who, based on different sources, provide a comprehensive overview of the wage scale system in the mid-1960s.

(e.g. in the agricultural sector, see Mesa-Lago, 1994). However, as the contextual literature describes (e.g. Hernández & Mesa-Lago, 1971; Mesa-Lago, 1994; Mesa-Lago & Pérez-López, 2013), in the second half of the 1960s, bonuses, overtime payments, and the so-called historical salary were gradually abolished. These sources also note that political leaders increasingly emphasized the use of *moral incentives* instead of material incentives. We will now take a closer look at the conception and (e)valuation patterns underlying this third type of reward.

Moral Rewards—Socialist Emulation: Between Material Outcome Equality and Moral Equity

In the contextual literature, so-called *moral rewards*—mainly referred to as *moral incentives*—are generally linked to the political-economic philosophy of Ernesto "Che" Guevara and his followers. As described by the literature, moral incentives, in their positive form, could be individual (e.g. in the form of awards or medals for individual workers) or collective (e.g. in the form of awards for a firm or a working team). If applied as a substitute for monetary rewards, and in combination with the above-discussed social rewards, the conception of moral rewards may indeed contain the idea of *material outcome equality* and/or distribution according to *biological and/or basic needs*. However, in their basic conception, moral rewards are also closely linked to the idea of socialist emulation. This (real-)socialist form of competition was, at that time, expected to spur workers on to production and thus accelerate the construction of socialism. In this sense, moral rewards also express an aspect of the (real)-socialist version of the contribution rule, which includes both the idea of the measurability of work and the idea of the necessity of incentives:

> [9] and we will only give the technical advice, the way to valuate, the way to measure emulation, so that the different types of work can achieve common measures that will later allow them to be compared with each other. At the same time, we have to establish incentives in emulation, moral incentives, such as how workers can see themselves individually or collectively in a workplace, as the best of the best.

Note that moral incentives can also be conceived of in a negative form, e.g. in the withdrawal of formerly received honours, or in public condemnation of workers who do not conform to the contribution rule. In this context, Farber (2011, pp. 145–150) notes a relationship between the increasing emphasis on moral incentives during the second half of the 1960s and, at the same time, reinforced control measures to strengthen labour discipline, sanctions, and forced labour.

The 2010s: Updating the Socio-Economic Model

As described by the contextual literature, in the 2010s the Cuban state continued to have a monopoly on labour and the main means of production in the country. However, in the context of recurrent economic crises, observers note important changes in contemporary Cuban social and economic structures, such as increasing overall

poverty and income inequalities. Authors also point to a gradual retraction of the state sector, particularly in its functions of main employer and property manager –accompanied by an increasing importance of other economic sectors (such as the so-called private, mixed, and cooperative sectors; many authors also highlight the importance of informal and illegal sectors in the contemporary Cuban economy). In this context, former president Raúl Castro[14] had announced structural reforms already by the end of the 2000s. The resulting set of reforms is known as *the update of the socio-economic model* or (or simply *the update*) and was set out in the *Guidelines of the Social and Economic Policy of the Revolutionary Party* (2011). In 2016/2017 the Cuban Communist Party (PCC) approved three strategic documents containing changes of this reform agenda (Bye, 2020: 92–93; 103), among them an updated version of the *2011 guidelines*.[15] In the following, I present some results of the in-depth discourse analysis for this period, focusing particularly on possible configurations of the categories and (e)valuation patterns carved out in the previous sections.

Overall Distribution: The Economic Battle, Equality of Rights and Opportunities, and Contribution

The *seesaws* that the contextual literature notes for the entire history of the revolutionary government, its policies, and their rhetorical framing, seem to apply also to the framework of institutions and political leaders' views in the 2010s. Nonetheless, many of the (e)valuation patterns described in the previous section for the 1960s, can be retrieved also in the 2010s, although with some modifications. The discursive storyline of the *economic battle* has continued until the recent past:

> [10] The economic battle is today, more than ever, the main task and the centre of the ideological work of the cadres, because the sustainability and preservation of our social system depend on it.
> [11] The economic battle remains the fundamental task and also the most complex one. It is the task that is most demanding of us all today, because it is the one our people expect the most from.

We have seen that in the early 1960s, the *economic battle* was often framed with the idea(l) of a better future for Cuban society. In the 2010s, the *economic battle* seems to have a threefold frame: it is depicted as fundamental to preserve past (social) achievements, meet the (peoples') demands of the present and fight for a better future. Similar to the 1960s, the importance of 'enlarging the cake'

[14] Raúl Castro became acting president of the Republic of Cuba in 2006 to represent his sick brother Fidel and was officially appointed president in 2008.

[15] New reform packages were adopted again at the end of 2020/beginning of 2021, in the framework of establishing a *new monetary order [ordenamiento monetario]* and resolutions of the eighth congress of the PCC in April 2021. However, at the time of writing, these changes could not yet be included in the analysis.

and the consequent emphasis on economic constraints and requirements, including, above all, increases in efficiency and productivity, are put forward:

> [12] Let us bear in mind the essential principle that in order to distribute wealth, it must first be created, and to do so, we must steadily raise efficiency and productivity.

The macrojustice rules of *minimum standards* and *biological and/or basic needs* are also present in several discourse fragments of the 2010s, where they are, in some cases, directly connected to the *economic battle*. In other cases, they are found as an 'annex' to the announcement of equity and/ or de-equalizing measures, oftentimes represented by the typified statement *that no one will be left without protection [desamparado]*. It seems, however, that there is a growing emphasis on individual responsibilities regarding the satisfaction of these needs. In the *Labour Code* adopted in 2013, we retrieve the pattern of a twofold prerequisite of work*:* by exercising their right and duty of work, citizens are expected to contribute to both societal development and the satisfaction of their individual needs. Interestingly, in this conception, it is through work incomes that contribution is made:

> [13] work is a right and a social duty of the citizen and the income obtained from it is the fundamental way to contribute to the development of society and to the satisfaction of their personal and family needs.

Besides the 'survival' of these macrojustice patterns—albeit in slightly altered configurations –, another recurrent pattern identified for the 2010s is *equality of rights and opportunities,* which is frequently accompanied by criticism of *egalitarianism [igualitarismo]*. Note, however, that these patterns do not emerge in this period—especially *criticism of egalitarianism* can already be retrieved in discourse fragments of earlier decades. In the original *guidelines* of 2011, both patterns are coupled to a general conception of the equity rule:

> [14] socialism means equality of rights and opportunities for all citizens, not egalitarianism. Work is simultaneously a right and a duty, a motivation for personal realization for each citizen, and should be rewarded according to its quantity and quality.

Social and Monetary Rewards: Maintaining Revolutionary Conquests, Abolishing Gratuities, and a New Version of Equity?

Apart from the continuous emphasis on the *economic battle*, the prerequisite of (hard) work and contribution to society, some ruptures with the foundations of the framework of institutions and political leaders' views, as we discussed them for the period of the early 1960s, can be observed. One example is the idea of moral rewards or incentives*,* which seems to have nearly disappeared in the 2010s. Regarding social rewards in general, both versions of the *guidelines* (2011; 2017), mention the objective for social policy to.

> [15] [c]ontinue to preserve [2017: consolidate] the achievements of the Revolution, such as access to medical care, education, culture, sport, recreation, public peace, social security and protection through social assistance to those in need.

Note, however, that the phrasing of this objective is to preserve *access* to social rewards, but not *free access*—a conception of just rewards that various discourse fragments of the early 1960s highlight. If we look at the example of supply distribution, we can state that the *Libreta de Abestecimiento* has continued to exist—despite various announcements over the past decades to abolish this system of supply distribution. The aim of an "orderly and gradual elimination" of the supply booklets is also set out in the *guidelines* (2011; 2017). Another passage of the *2011 guidelines* depicts the abolishment of such gratuities and subsidies as part of the *economic battle* (here represented by the goal to increase labour productivity, discipline, and motivation) and the organization of wages:

> [16] it will be necessary to […] [i]ncrease labour productivity, raise the discipline and motivation level of wages and incentives by eliminating egalitarianism in the mechanisms of income distribution and redistribution. As part of this process, it will be necessary to eliminate undue gratuities and excessive subsidies.

In general, the necessity to realize the *socialist principle of distribution 'from each according to capacity, to each according to work'* is a recurrent pattern in the period of the 2010s. It is often framed with the metaphor of an *inverted pyramid*. This metaphor is generally used to describe that qualification, work and income are not in the 'right' relation to each other, i.e. that professions requiring a high qualification are not rewarded with an accordingly high income. In turn, it is stated that people may have high incomes that are either non-work-related (e.g. because they receive remittances from abroad) or related to low skilled work (e.g. in the tourist sector, where tips can lead to high additional incomes). The *inverse pyramid* is perceived as a cause for low productivity, working motivation, and a brain drain within the Cuban economy, and thus as a threat to the *economic battle*. President Díaz-Canel quotes Raúl Castro's description of this pyramid as follows:

> [17] the unfair [injusta] inverted pyramid, in which with greater responsibility one receives lower pay and [in which] not all able citizens feel motivated to work legally, while at the same time discouraging the promotion to higher positions of the best and most qualified workers and cadres, some of whom emigrate to the non-state sector.

According to Cuban statistics (ONEI, 2019), in 2018, the state sector still employed around two-thirds of the Cuban labour force, despite relatively massive layoffs of state workers during the past decade (e.g. Bye, 2020). Here, wage scales

and work norms are still in force. Although these have been subject to reforms and changes over the years, their principle composition in the 2010s remained similar to the early 1960s.[16] Roughly described, wages in the scales that were in force until the end of 2020 consisted of a basic wage and additional payments for a wide range of possible criteria, such as working time, qualification, responsibility, seniority, individual, and team output.[17] In the framework of the *update*, the Cuban government adopted several legal resolutions to regulate both basic wages and additional payments. In political debates, the latter have been discussed especially with regard to pay-for-performance systems in the state enterprise system, where *incentive bonuses [estímulos]* were (until the end of 2020) an important integral part of workers' wages. However, in the case of non-achievement of (individual or team) working norms, bonuses could be subject to sanctions and thus to possible monthly fluctuations (in a range between zero to three times the basic wage of a worker).

In summary, we can state that in their ideational conception, state wage scales in the 2010s answered to the equity rule—we could say, to a *reconfiguration* of its real-socialist version as I described it for the 1960s. At the same time, this period is marked by strong criticism of low overall levels and differentiation of wages in the state sector, also voiced by the political leadership. Margarita González Fernández, minister of labour and social security, cites these problems in the context of wage increases in the public sector in 2019, insinuating the necessity of further wage reforms:

> [18] this is a first step, it does not mean that it is the definitive solution, but it is a first step towards the solution of a problem of the current salary scale, regarding the very small differences between the different groups of complexity that did not stimulate to do better and drive.

This leads us to the assessments of *actual rewards* found in contextual literature for the period of the 2010s. Despite increasing nominal wages in the past decade, real wages in the state sector have been considered insufficient to cover daily living expenses in Cuba (Echevarría & Tejuca, 2017), and their purchasing power is said to have radically declined since the 1980s (e.g. Bye, 2020; Vidal, 2016). Anaya & Garcia (2018) estimated basic expenses for Cuban urban families of three, accounting for subsidies and supply distribution. They state that in 2016, an equivalent of two to three average state wages—or nine to ten minimum wages—of that year was necessary to cover such basic expenses. This stands in contrast to the above-mentioned high wages in other economic sectors, or non-work-related incomes (often in currencies offering a greater purchasing power than the Cuban Peso), and income privileges for certain groups (e.g. political and military elites). Additionally, the quality of and access to the so-called social rewards, e.g. of social security, health, and education, is said to have declined, especially since the crisis of the 1990s (e.g. Domínguez, 2017; Bye, 2020).

[16] Note that some substantial changes were made to the wage scales in 2020/21, which, as explained in footnote 15, could not be included in the analysis.

[17] See, for example, the overview provided by Galtés (2016).

Conclusion

The analysis of (e)valuation patterns of distributive justice in the Cuban framework of institutions and political leaders' views, both in the early 1960s and the 2010s, has revealed a range of patterns that can indeed be classified as *egalitarian*. However, the results of the analysis allow us to make a few distinctions regarding the assumptions on *egalitarian state-socialist ideologies* that were addressed in the introduction of this article. By basing the analysis on the conceptual framework of the multiprinciple approach of justice, further (distributive justice) patterns and rules were found. In many cases, these are not incompatible with egalitarian ideology, but rather integrated into it, or, in some cases, used to criticize and update parts of it (without completely renouncing the overall ideology). Apart from patterns that are generally understood as expressions of an egalitarian ideology (in general, outcome equality and non-functional need rules), the analysis further pointed out patterns of equity (and its different sub-rules), functional needs, and other (functional and non-functional) allocation rules in the Cuban framework of institutions and political leaders' views.

For instance, the analysis showed that functionalist allocation rules, often appearing in the context of economistic or productivist (e)valuation patterns, were already present in the ideas and actions of the Cuban revolutionary government in the early 1960s. They are not necessarily contradictory to egalitarian conceptions of overall distribution and just rewards but can in fact be "combined" with them—as, for example, the *economic battle* was used to justify equalizing just and/or actual rewards in the early 1960s. Regarding supposed changes in Cuban state-socialist ideology, the results suggest that many of the (e)valuation patterns of just rewards prevalent in the 2010s can be conceived of as reconfigurations of patterns of the early 1960s. For example, in the 2010s, minimum distribution standards and needs have not disappeared. However, corresponding patterns of the 1960s, such as moral incentives or the idea of equalizing measures to reach minimum standards, have become less important in the 2010s, or were partly replaced by other patterns, e.g. by the emphasis on equal opportunities, individual responsibilities, and the role of wages to fulfil basic needs. In this regard, one could indeed argue that *equality of rights and opportunities* has gained in importance with respect to *outcome equality* in the Cuban framework of institutions and political leaders' views. However, as above-mentioned, it must be taken into account that the foundations for this change were laid way earlier (considering, for example, Fidel Castro's early critiques of *egalitarianism* in the 1970s). As shown in the analysis, the equity rule (and its sub-rules) is emphasized in both periods—to justify both moral and material incentives in the early 1960s, and to criticize the *inverted pyramid* in the 2010s.

Please note in this context that with the above-described results, *changes over time* in the Cuban framework of institutions and political leaders' views can only be cautiously addressed here. Since the results are based on a purely qualitative analysis focussed on two specific periods, they provide information mainly on the occurrence of (e)valuation patterns in these periods, and less so on changes in salience of these patterns over time (Fig. 2).

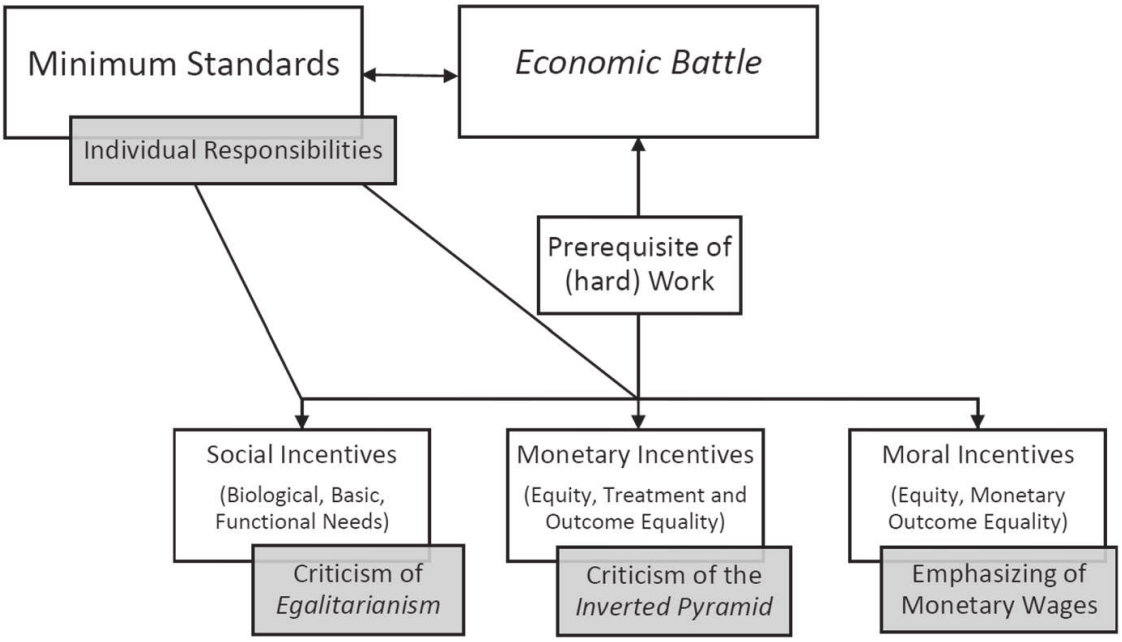

Fig. 2 Basic (e)valuation patterns (white) and their updates (grey)

All in all, based on the results of the Cuban case, we can, in a more general manner, reject the assumption that *egalitarian state-socialist ideology* is merely based on (non-functionalistic and non-meritocratic) allocation rules of outcome equality and need. For many, this insight will be neither new nor surprising. Indeed, the presence of equity patterns in Cuban state-socialist ideology can even be traced back to Marxist theory. According to Marx (1973, pp. 24–25), the allocation rule "from each according to ability, to each according to needs" would be realized only at "a higher state of communist society". Until then, socialist distribution would necessarily be based on work—and thus on some form of the equity rule and its sub-rules. Supposing that Cuba, like other real-socialist societies, has never reached this "higher state," the emphasis on equity allocation rules does not seem surprising. Indeed, sub-rules of equity contain the promise of commensurability, i.e. the promise to provide more or less exact standards to measure work as a contribution to society, which is fundamental to the conception of planning economies. At the same time, the "flexibility of the original equity formulation" (Fischer, 2016, p. 467) allows for different interpretations of equity and its sub-rules, so that, as we have seen, the "socialist principle of distribution" may be configured and reconfigured for different contexts and time periods in the same country. Similarly, the prevalence of economistic and productivist patterns in state-socialist societies based on Marxist conceptions of socialism is not surprising either, considering that some parts of Marx' economic theory defend, among other aspects, the primacy of the economy and labour value theory (see, for example, Heinrich, 2009; Streckeisen, 2018).

However, the assumptions on *egalitarian state-socialist ideologies*—as well as on (allegedly) opposite ideologies in (market-)capitalist societies –, which were addressed in the introduction, are still under discussion. The analysis of the Cuban case presented in this article may serve as a reminder that, "as equality may be conceptualized in a variety of ways, it is important to avoid miscommunication by being

explicit about the specific (sub)type of equality at hand" (Törnblom & Kazemi, 2015, p. 30)—be this in state-socialist or market-capitalist contexts. Adopting such a stance may then also serve to revisit, for example, the conception of "communist variables" (based on cultural approaches) in comparative attitude research, as discussed in the introduction.

Moreover, the conceptual distinction of actual and just rewards defended in this article may serve as a reminder that any conception of a just distribution—also a so-called egalitarian or needs-based conception—is likely to be accompanied by *actual unequal outcomes*. The results of the analysis presented in this article showed some examples of how such inequalities are justified or criticized in both the early 1960s and the 2010s by referring to different (e)valuation patterns. Although actual rewards have only been addressed very briefly in this article, at least one observation for future Cuban-specific research can be made at this point: Studies that aim to examine individual attitudes towards distributive justice in Cuba should, besides considering (supposed) changes in ideology, account for a distribution of actual rewards in contemporary Cuba that is characterized by increasing (overall, sector-, and group-specific) inequalities. The defence or rejection of allocation rules and the conception of just rewards on an individual level may (highly) depend on (perceptions of) the distribution of actual rewards and/or their consistency with conceptions of just rewards.[18]

Appendix

The quotes in the chapter *Analysis* were chosen according to their density of information and/or their potential represent further discourse fragments, i.e. to serve as typical or exemplary statements.

References to the quotes:

[1] Ernesto "Che" Guevara (30 April 1962): Speech at the Ministry of Industry's Award Ceremony for Outstanding Workers. Source: http://www.cubadebate.cu/especiales/2018/06/14/ernesto-che-guevara-socialismo-es-productividad-mas-conciencia/. Accessed 14 June 2019.

[2] Law no. 1100 of 2 March 1963. Source: Finanzas al Día (1963). *Leyes del Gobierno Revolucionario de Cuba. Marzo, Abril y Mayo de 1963*. La Habana: Editorial Nacional de Cuba.

[3] Ernesto "Che" Guevara (6 January 1962): Speech at the General Assembly of Port Workers. Source: Guevara, E. C. (1977). *Escritos y Discursos 6*. La Habana: Editorial de Ciencias Sociales.

[18] Of course, this suggestion may also apply to the international attitude research mentioned in the introduction. On an empirical level this could mean, e.g. precisely differentiating between items on just rewards and items on actual rewards in questionnaires—which is not always the case in existing questionnaires. Janmaat's (2013) literature review with its conceptual distinction in perceptions, beliefs and judgements of *fair* and *existing* inequalities offers interesting insights in this regard.

[4] Fidel Castro (28 November 1961): Speech at the XI Congress of the Cuban Trade Union Federation. Source: http://www.cuba.cu/gobierno/discursos/1961/esp/f281161e.html. Accessed 14 October 2019.

[5] Law no. 1015 of 12 March 1962. Source: Finanzas al Día (1962). *Leyes del Gobierno Revolucionario de Cuba. Marzo, Abril y Mayo de 1962*. La Habana: Editorial Nacional de Cuba.

[6] Ernesto "Che" Guevara (30 April 1962): Speech at the Ministry of Industry's Award Ceremony for Outstanding Workers. Source: http://www.cubadebate.cu/especiales/2018/06/14/ernesto-che-guevara-socialismo-es-productividad-mas-conciencia/. Accessed 14 June 2019.

[7] Augusto Martínez Sánchez (16 May 1964): "A un mayor trabajo y una mayor calificación, un mayor salario", newspaper article in *Hoy*, 16 May 16 1964. Source: Hernández, R. E. & Mesa-Lago, C. (1971). Labor Organization and Wages. In C. Mesa-Lago (Ed.), *Revolutionary Change in Cuba.* Pittsburgh: University of Pittsburgh Press, 209–249.

[8] Fidel Castro (29 August 1966): Speech at the XII Congress of the Cuban Trade Union Federation. Source: http://www.fidelcastro.cu/es/discursos/discurso-pronunciado-en-la-clausura-del-xii-congreso-de-la-ctc-r. Accessed 30 October 2019.

[9] Ernesto "Che" Guevara (15 April 1962): Speech at the National Council of the Cuban Trade Union Federation. Source: Guevara, E. C. (1977): *Escritos y Discursos 6*. La Habana: Editorial de Ciencias Sociales.

[10] Raúl Castro (4 April 2010): Speech at the Congress of the Cuban Young Communist League. Source: http://www.cuba.cu/gobierno/rauldiscursos/2010/esp/r030410e.html. Accessed 28 October 2019.

[11] Miguel Díaz-Canel (23 March 2018): Speech at the Council of Ministers. Source: http://www.escambray.cu/2018/diaz-canel-la-batalla-economica-sigue-siendo-la-tarea-fundamental-y-tambien-la-mas-compleja/. Accessed 21 October 2019.

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[17] Miguel Díaz-Canel (21 December 2019): Speech at the National Assembly. Source: http://www.granma.cu/discursos-de-diaz-canel/2019-12-21/diaz-canel-en-el-parlamento-cubano-unidos-hemos-vencido-unidos-venceremos. Accessed 25 October 2019.

[18] Margarita González Fernández (2 July 2019): Statement in the TV talk show *Mesa Redonda*, partially quoted on the related website (quote transcribed from the original video). Source: http://www.mesaredonda.cubadebate.cu/mesa-redonda/2019/07/02/diaz-canel-la-suma-de-todos-esos-esfuerzos-haga-el-milagro-de-la-prosperidad-sostenible-a-la-que-no-hemos-renunciado. Accessed 19 October 2019.

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2.3 Article C: The 'Inverted Pyramid' and Beyond: Perceptions of Distributive Justice among (Highly) Qualified Workers in Contemporary Cuba

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The *Inverted Pyramid* and Beyond: Perceptions of Distributive Justice Among (Highly) Qualified Workers in Contemporary Cuba

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Abstract

In 2020/2021, wage scale reforms were implemented in Cuba to improve distributive justice. The previously long-prevailing wage system and resulting wage structure, often referred to as an *inverted pyramid*, is said to have especially affected (highly) qualified workers in Cuba. This research provides emergent and partly speculative data on perceptions of distributive justice that (highly) qualified workers in Havana held during the time of change. The results of the exploratory study reinforce and illustrate the common claim in the literature that wage differentiation based on equity principles receives broad support. At the same time, we show how principles of need and equality also have their place in the interviewees' reasonings. Finally, we outline two different patterns that interviewees invoke to explain why they perceive equity violations as unjust.

Keywords

Cuba, distributive justice, equality, equity, multiprinciple approach of justice, need, wages, work

Introduction

Academic, media, and political discourses about Cuban salaries often use the metaphor of an *inverted pyramid* to describe the Cuban wage system and its resulting wage structure that prevailed for the past six decades. The so-called *wage egalitarianism* in the state

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sector and its adverse consequences, that is (highly) qualified professionals in the state sector earning much less than low-qualified occupations in other sectors of the economy, have long been criticised – not least by the leading figures of the Cuban Communist Party (e.g. Castro, 2014). In the context of the wider transformations of the state-planned economy, the past decade has seen reforms of this wage system culminating in the so-called new monetary order in 2020/2021. As part of the currency unification,[1] wages were not only generally raised but also (further) differentiated according to professions and qualifications. The principle 'to each according to ability, to each according to work' has often been mentioned in this context; it is even anchored in the current constitution (Constitución de la República de Cuba, 2018: Art. 65).

Distributive justice literature refers to the above justice principle – or at least to its second part, 'to each according to work' – as the *equity principle* (sometimes also *contribution-*, *achievement-*, or *proportionality* rule or principle). Various studies show that there is broad support for this principle across different social groups, countries, and cultures, especially regarding wage distribution. Early research on attitudes towards occupational earnings hierarchies and ratios found that 'equality of earnings is nearly universally rejected by the public of industrial societies, Communist (Sarapata, 1963) as well as capitalist' (Alves and Rossi, 1978: 547; Kelley and Evans, 1993). Quantitative studies conclude that, despite some nuances, there is at least partial consensus among countries regarding the general order of the occupational earnings hierarchies, as well as desired wage levels at the bottom of these hierarchies (e.g. Gijsberts, 2002; Kelley and Evans, 1993). The research also states that individuals and nations differ in their attitudes towards occupational hierarchies and income ratios. This is especially true for the overall level of income inequality and the income differences that people consider desirable between different occupations (e.g. Andersen and Yaish, 2012; Aristei and Perugini, 2016; Hadler, 2005; Ignácz, 2018; Kelley and Evans, 1993; Kelley and Zagorski, 2005; Osberg and Smeeding, 2006; Redmond et al., 2002). Although the general order of occupational earnings hierarchies within and across countries is less controversial, some studies point to national (or cultural) differences in this regard. This is especially the case when comparing (former) state-socialist to market-capitalist societies (e.g. Duru-Bellat and Tenret, 2012; Gijsberts, 2002), e.g. regarding the (e)valuation of blue- versus white-collar workers (Gijsberts, 2002).

Theoretically, the original formulation of equity is *vague* or *flexible* enough to be interpreted in different ways and to be compatible with other justice principles (Fischer, 2016). Advocates of a *multi-principle approach of justice* stress that different principles of justice can coexist (with equity, equality, and need usually named as overriding principles) and that finer distinctions are possible, that is, that they can be divided into sub-principles (see, e.g. Törnblom and Kazemi, 2015). For example, equity could be subdivided into the principles of productivity, effort, and ability; equality could be subdivided into the principles of equality of treatment, outcomes, and opportunity; and need could be subdivided into the principles of biological, basic, and functional need (Törnblom and Kazemi, 2015).[2]

Against the backdrop of these theoretical considerations and empirical findings on market-capitalist countries in the Western world and/or former state-socialist countries, this article focuses on perceptions of distributive justice in contemporary Cuba (Havana). The Caribbean Island has formally remained a constitutionally socialist state with a

mainly state-led and centrally planned economy that has started opening its markets to private businesses for some years now. When the wage reforms described above were introduced, we interviewed (highly) qualified workers, the group that is said to be most affected by the *inverted pyramid*, about their perceptions of wages and distributive justice. The research, based on face-to-face interviews and an online survey, has a preliminary and explorative character. The results illustrate interviewees' arguments in favour of wage differentiation based on equity principles, but also point to principles of (basic) need and equality (of outcomes). These findings tie in with the existing literature and may serve as a basis for future research, in Cuba and beyond.

Data and methods

The analysis presented in this article draws on two data sets: face-to-face interviews (N = 19) and an online survey (N = 91), with the former being the main basis for analysis. A common characteristic among both samples is that the respondents are highly qualified workers, as determined by their initial vocational or professional degrees, hailing from various professions and occupations in Havana.[3] This group seems to be most impacted by the inverted pyramid and is therefore likely to have thoughts about the topic. The online survey was developed in the context of the COVID-19 pandemic[4] in collaboration with the Department of Sociology at the University of Havana and was conducted between June and September 2020. Most of the survey items were sourced from international surveys, such as the International Social Survey Programme and the International Social Justice Project, and were partially adjusted to align with the Cuban context. The survey includes questions concerning personal satisfaction (with work, salary/income, and life in general); occupational rankings; the assessment of wage criteria; (dis)agreement with statements on income inequality, redistribution, work; as well as socio-demographic questions. Initially, the questionnaire was distributed through mailing lists of the University of Havana, primarily targeting students and employees in the social sciences, economics, humanities, and natural sciences. Subsequently, it was disseminated through a snowballing approach. This has resulted in a rather homogeneous sample in terms of the participants' educational level, with 77 out of 91 respondents reporting possession of a university degree and 14 having completed high-school education. The sample is predominantly female (56 women, 33 men, and 2 unassigned) and is relatively young (48 participants aged 21–30, 34 participants aged 31–55, and 9 participants aged 56–65). These distinctive sample characteristics offer some contextualization for insights; however, they impose limitations on the ability to draw inferences (Baur and Florian, 2009). Given these constraints, we use the data solely for descriptive purposes to complement the findings of the qualitative interview analysis.

Face-to-face interviews were conducted between November 2020 and March 2021. Interviewees were drawn either from the pool of survey participants or identified through a snowballing approach. When selecting participants, we followed a purposive sampling strategy of *least similar cases* in order to achieve heterogeneity in terms of professions, biographical trajectories, gender (9 women, 10 men), and age (ranging from 23 to 60).[5] The interview guideline contained narrative and dialogue elements (Witzel and Reiter, 2012). Key topics covered in the interview guide included the interviewees' work

biography; supplementary questions about decisions and motivations regarding this biography (particularly concerning economic considerations, work satisfaction, reflections on social (in)justice, and the interviewees' concept of work); an assessment of the current situation of the Cuban realm of work, its biggest problem(s) and ongoing reforms; and socio-demographic questions. Interview transcripts were analysed with grounded theory methodology, that is, using open, axial, and selective coding, as well as memos and comments (Corbin and Strauss, 2008). Essential guiding questions in the coding process were as follows: What role do distributive justice in general, and justice principles such as equity, equality, and need play in the interviewees' lives? Do the interviewees address these principles when describing their work biography, and if so, how?

Discussion of results

Support for equity principles and wage differentiation

In nearly all interviews, wages are a prominent theme, particularly in response to the question regarding the biggest problem in the Cuban realm of work. Most interviewees criticise the wage system that has prevailed in Cuba over the past decades. Our bottom–up analysis reveals reasoning patterns that rely on equity principles and are connected to the idea of wage differentiation according to *qualification*. This result aligns with the literature on distributive justice. For example, when Alfredo (46), who was trained as a school teacher but has been working as a tourist guide for the past two decades, was asked about the ongoing reforms at the time of the interview, he replied:

> I approve. I approve. Let's see, eh . . . years ago when I started as a teacher it wasn't the same salary as it is now. It wasn't the SAME. Eh, years ago, for example, a master or a doctor . . . earned forty or fifty pesos, or a hundred pesos more, not now [now it is different]. And so, it is like they are starting to value professionals. I don't know if I am making myself understood. And I think we needed it. A doctor, a lawyer . . . Do you understand? So, sometimes, for example, you would meet someone in the street, who worked . . . in a cab and who earned more than a doctor. Unjust! Unjust! So, I think that, that, that . . . that the pyramid is . . . taking its shape. And I like that, I like that. (Alfredo, para. 34)

Much like Alfredo and several other interviewees, Pavel (26), who dropped out of his studies in industrial engineering and stays afloat with part-time, unqualified work, portrays the wage structure in Cuba as an *inverted pyramid* and regards it as the main problem with the Cuban labour situation. Similar to his peers, he invokes equity principles to describe and explain the situation. In contrast to Alfredo, Pavel does not directly describe the perceived problems as *unjust*. When asked how the problem of the inverted pyramid could be solved, he responds:

> I think to equalize salaries a bit and to give more to . . . to, to whoever has more merits. The state has done that in a way, but, for example, ME, getting paid, being an engineer, graduating in industrial engineering, which is what I was studying, I will never be able to get paid what I work as a waiter, in a private restaurant. [Interviewer: Mhm, and that seems unjust to you?] Mh, it doesn't seem unjust to me s-, eeh, because . . . I don't know how to explain it. In a way, I think that the government should . . . stimulate its workers more. (Pavel, para. 43)

Pavel's difficulty in articulating his views reveals ambivalence: while he advocates for equity (referring to a rather general formulation: according to *merits*), he is also hesitant when it comes to a hierarchical evaluation of different occupations and activities. Like Pavel, none of the interviewees elaborates on *how* exactly they envision a just distribution of wages, that is, *who* should receive *how much* from the fruit of *which* labour. One possible explanation for this vagueness can be found in the characteristics of the general formulations of equity (i.e. 'to each according to work/merit/etc'.). Furthermore, these formulations are considered a 'form of a social contract' (Fischer, 2016: 467), so they are generally agreeable and need not be explained further in everyday conversations. At the same time, the formulations remain vague enough to be 'open to various interpretations and [. . .] implemented differently across situations and individuals' (Fischer, 2016: 466).

In contrast to the face-to-face interviews, the online survey attempted to pinpoint the respondents' conception of a fair wage hierarchy with greater precision. They were requested to rank 10 occupations[6] based on which occupations they believed *should* earn more than others. Interestingly, the results deviate from those of surveys concerning wage hierarchies in other (post-)socialist states, where blue-collar jobs are more valued than white-collar jobs (Duru-Bellat and Tenret, 2012; Gijsberts, 2002; Treiman, 1977). In our sample, the unqualified industrial worker was ranked at the bottom of the list by 49% of respondents and in the bottom three by 72% of respondents. Meanwhile, white-collar workers are clearly at the top of the hierarchy, as 57% of respondents believe that physicians should earn the highest salary. This may reflect either the symbolic and discursive valorisation of this profession in Cuba or the respondents' orientation to wage hierarchies in the Western world.

Needs- and equality-based reasoning

In addition to equity-based reasoning, the interviewees also base their arguments on principles of need, and to some extent, on equality principles. Almost all interviewees regard wages, particularly state wages, as insufficient for daily life in Cuba. Most of them frame their reasoning with principles of basic needs, which 'refer to those that allow a "decent" life in parity with the "normal" standard of living in the person's society' (Törnblom and Kazemi, 2015: 26). For example, interviewees believe that wages should be sufficient to live a 'stable' (e.g. Ernesto, para. 73) or a 'decent' (e.g. Gabriela, para. 37) life, including essentials such as (balanced) nutrition, clothing, and the maintenance of children. This emphasis on basic needs is also reflected in the online survey, where 64% of respondents view 'what is needed to maintain a minimum standard of living' as an 'essential' criterion for determining wages, while another 32% consider it 'very important'.

Furthermore, some interviewees discuss needs that may not be considered fundamental but which they nonetheless perceive as important for a decent life. They express these needs using terms such as 'pleasure' (e.g. Caridad, para. 68, referring to buying a box of cookies), 'luxury' (Manuel, para. 26, referring to university studies), or 'gratification' (e.g. Charlie, para. 68). In line with other interviewees, Charlie (30), a financial analyst currently pursuing a part-time university degree in economics, specifically mentions

holidays and travel. Charlie portrays himself as content with his life in Cuba, expressing no direct complaints about his salary as a state employee (which he supplements with side jobs in tourism). When asked about the biggest problem of the Cuban realm of work, he initially responds with a generalisation:

> Well . . . One thing that most . . . shocks . . . many people, is the salary part. . . . Where . . . (sighs) sometimes mh, it is not enough. . . . [. . .] what I mean is that in general, many people here in Cuba can't satisfy many of their needs. Or, treat themselves to many things, to the many beauties *(riquesas)* that exist in this country. Eh . . . because, they can't, that is, eh for . . . they have many situations at home, or, or . . . things to – a lot of things to worry about. Before they can gratify themselves. (Charlie, para. 42)

Charlie's needs-based argumentation is a carefully formulated critique that suggests that (state) wages in Cuba are insufficient and that Cuban workers in general should earn more. Charlie's wish expressed later in the interview is that

> Cuba ehm, would give . . . would have the opportunity to give people . . . eh, more things. That is to say that with the fruit of your work . . . you can say: Well, this year, I want to spend three days in Varadero. (Charlie, para. 43)

For many contemporary Cubans, a weekend in Varadero (a popular holiday resort) is an unattainable luxury. Charlie believes that if one works, one should be able to afford a vacation in Varadero. This argument can be viewed as an expression of an equality principle, namely that of equal outcomes (for *all workers*). This illustrates how principles of equity and equality can be combined within arguments, a point we will revisit in the conclusion.

Causes for perceptions of injustice due to equity violations

As exemplified by Alfredo and Pavel's quotes, the interviewees differ in the extent to which they consider the prevailing wage system to be *unjust.* Yet, many clearly express that they perceive injustices, especially regarding the inverted pyramid resulting from the current system. One (albeit speculative) observation emerging from our analysis is that critiques of perceived injustices that relate to equity principles (i.e. mostly according to qualification and/or effort/performance) fall into two main categories: *blaming structures* and *blaming individuals*. Interviewees who believe that the root causes of injustice primarily lie within the (political and economic) system and its structures criticise the insufficient wage differentiation and low wages in the state sector. For them, this context provides insufficient incentives for work and educational efforts, despite the prestige associated with certain positions. Consequently, they argue that it fosters laziness or unproductivity. Juan, a former surgeon turned taxi driver, sums it up as follows:

> [T]he state . . . mh, it doesn't guarantee you anything. Eh, it's, it's like we say a-, eh here in Cuba, I pretend I work, and you pretend you pay me. (Juan, para. 53)

Other interviewees, in turn, see the main problem of the Cuban realm of work in the attitudes and (lacking) effort of the individuals. These interviewees, who consistently

highlight their personal achievements and accomplishments, believe that it is the individual lack of work ethic that leads to detrimental effects in the (wage) system and thus produces wage injustice:

> There are many people who say that no, eh, the problem is that . . . we are not in a capitalist country. . . . That's the concept, isn't it? If . . . you earned according to your work . . . it would be different. And I don't see it that way. It's a problem of, as I already told you, education, ethics, values. (Maria, para. 25)

Interestingly, the two categories *blaming structures* and *blaming individuals* appear to correspond with the interviewees' attitude towards *the political system*.[7] The analysis reveals that the majority of interviewees who hold a *negative* view of the political system in Cuba identify *structures* as the main cause of problems and injustices in the Cuban realm of work. In contrast, interviewees with a *positive* view of the political system tend to *blame individuals*. In our sample, four out of 19 interviewees (two women and two men) fall into the pattern of *blaming individuals*. According to some studies, different experiences with 'socialist' regimes result in generational effects (Ignácz, 2018; for Cuba see, e.g. Krull and Kobayashi, 2009). However, the two identified patterns of views of the political system are not generation-specific, i.e. different generations are found in both patterns.

Conclusion

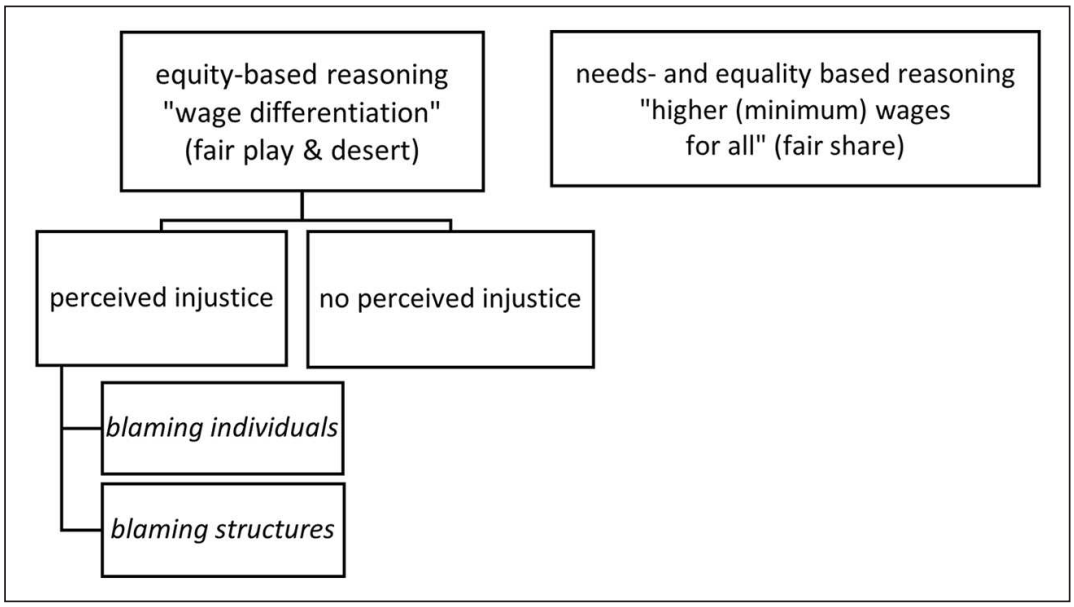

Figure 1. Different reasoning patterns used by the interviewees.

As depicted in Figure 1, we have identified different reasoning patterns among interviewees. Our results confirm the claim made in the justice literature that there is broad support for wage differentiation based on equity principles. At the same time, our data reveal reasoning patterns based on principles of (basic) need and equality (of outcomes). This finding supports the *multi-principle approach of justice*, as well as Fischer's (2016) claim

that 'various different rules such as [. . .] need and even equality can be reintegrated with equity' (p. 467). In addition, we outline two different patterns employed by respondents to explain why they perceive equity violations as unjust. We term these patterns 'blaming structures' and 'blaming individuals'. Our observation that equity-based reasoning may be based on people's attitude towards the country's political system is an interesting preliminary finding, particularly when considered alongside other studies addressing the issue of 'justice inferences' (e.g. Mijs, 2018). In this vein, our findings provide a novel and nuanced perspective on perceptions and reasoning patterns of distributive justice in Cuba. They warrant further exploration both within and beyond the Cuban context.

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Notes

1. During the economic crisis of the 1990s, the US dollar was introduced as a second currency besides the Cuban Peso (CUP); it was replaced in 2004 by a distinct convertible currency, the Convertible Peso (CUC), which prevailed until 2020/2021.
2. We will further address some definitions when discussing the results.
3. These include, for example, doctors, lawyers, architects, engineers, and workers in the hotel and gastronomy business. More detailed information on the samples and data is available upon request.
4. Originally, we planned to use focus groups.
5. It should be noted that the prior completion of the online survey, as well as the fact that some of the participants know each other, may influence research results and could, for example, partially explain similarities in reasoning.
6. The occupations were designated as follows: Physician, manager of a large company, restaurant owner, industrial worker (unqualified), residential landlord, farmer, school teacher, renowned artist, worker in the tourism sector (hotels, transport, guides, . . .), academic professional (engineer, professor, . . .).
7. We draw on interviewees' direct statements in favour of or against the political system (including statements about the political elite and the government), as well as on accounts of their experiences and behaviour.

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2.4 Article D: Subjectification of Highly Qualified Professionals in the Cuban Realm of Work: Analysing a Two-Sided Process

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Subjectification of Highly Qualified Professionals in the Cuban Realm of Work: Analyzing a Two-Sided Process

Nina Jany

Key words: subjectification; problem-centered interviews; interpretive subjectification analysis; discourse; subject positions; self-positioning; identity; professionals; work; Cuba

Abstract: In this article, I elaborate on discourses and discursively mediated subject positions regarding the working self in Cuba. My main objective is to analyze whether and how highly qualified professionals in Cuba position themselves relating to these discourses and subject positions. Building on the hitherto little-known conceptual framework of *interpretive subjectification analysis*, I perform the empirical analysis in two parts: First, I identify subject positions directed at Cuban workers in contemporary discourses on the Cuban realm of work. Second, based on qualitative interviews with highly qualified professionals in Havana, I reconstruct individual self-positioning modes. I demonstrate how the interviewees described and explained their professional biographies by relating to discourses and subject positions. By indicating similarities and differences with the existing literature on the working self in Western, post-Fordist, and neoliberal contexts, I intend to enhance the understanding of subjectification processes in a new context. Simultaneously, I evaluate whether the approach of *interpretive subjectification analysis,* which was developed in a Western, market-capitalist context, is equally fruitful for understanding subjectification processes in Cuba. In doing so, I contribute to the advancement of this approach.

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1. Introduction

Over the past decades, various scholars have analyzed contemporary labor discourses and subjectification processes of workers in Western, post-Fordist, neoliberal contexts. Discourse analysts have investigated the genesis and nature of a discursive subject generally referred to as *the self-entrepreneur* (BOLTANSKI & CHIAPELLO, 2017 [1999]; BRÖCKLING, 2015 [2007]; FOUCAULT, 1988, to cite just a few seminal works; for further developments within the framework of governmental studies, see, e.g., BÜHRMANN, 2005; MARTTILA, 2013). This, in turn, has led to further analyses of how this discursive subject, also called a subject position, is appropriated when (working) subjects self-interpret their position and form their identity (e.g., FARRUGIA, 2019). Until recently, researchers focused predominantly either on discourses or on subjects, omitting and tacitly presupposing either one or the other of these aspects in their analysis. Moreover, some analysts of subjectification viewed discourses as all-powerful structures that restrict the (working) subject's scope of interaction and reflexivity from the outset. [1]

A recent branch of the sociology of knowledge approach to discourse contains a new perspective on the concept of subjectification through *interpretive subjectification analysis* (e.g., BOSANČIĆ, 2014, 2016, 2018, 2019; BOSANČIĆ, PFAHL & TRAUE, 2019; KELLER, SCHNEIDER & VIEHÖFER, 2012). In this strand of research, subjectification is a two-sided process based on a definitional and theoretical framework that combines the interpretive paradigm of sociology and post-structural theories. [2]

In this article, I discuss whether and how this approach can be employed to explore subjectification processes as an interplay of discourses and subjects' self-interpretation/self-formation in a different context than the ones studied so far, namely in the Cuban realm of work. Nowadays, the application of Western concepts and methodologies in the analysis of the Global South is rightly being called into question (e.g., GO, 2016; NEUBERT, 2022). In this specific case, however, the (reflected) appropriation of Western concepts seems reasonable and potentially fruitful. This is based on the initial assumption that the concept of the *working self* is also pertinent in the Cuban context, where discursive narratives of state-led socialism intersect with those of global capitalism. However, there are important differences compared to the contexts studied so far on a discursive level. In previous studies, researchers have shown that in Western, post-Fordist, neoliberal discourses particularly the (self-)optimization and flexibilization of individuals has been emphasized (e.g., BOLTANSKI & CHIAPELLO, 2017 [1999]; BRÖCKLING, 2015 [2007]; RÖCKE 2017, 2021; SENNETT, 1998). Meanwhile, national and international contemporary discourses about the Cuban realm of work are focused on structural issues of the Cuban economy, which is generally depicted as being in a problematic condition[1].

1 From the wide range of literature on the topic, I mention only a few recent examples here: ANAYA and DÍAZ (2018); BYE (2020); IZQUIERDO and BURCHARDT (2017). With the COVID-19 pandemic, the Cuban economy is said to have deteriorated even more drastically, and the Cuban government has accelerated reform processes (some of which had already been planned and/or started before). HOFFMAN (2021) has attempted to grasp the impacts of crisis

While the descriptions of its problems and their causes vary by source, there seems to be a consensus that the main problems of the contemporary Cuban realm of work are related to, in short, persistent scarcity, excesses of planning and bureaucracy, and the so-called *inverted pyramid*, that is, a non-meritocratic order of the occupational (earnings) hierarchy. In this context, it is often emphasized that Cuba has a relatively large proportion of highly qualified professionals who suffer particularly due to these problems (e.g., ANAYA & DÍAZ, 2018; FEINBERG, 2016; RITTER & HENKEN, 2015). [3]

In the following, after briefly discussing methods and data (including some methodological considerations in Section 2), I outline parts of these discourses and associated subject positions directed at Cuban workers (Section 3). Using qualitative interviews conducted in Havana in 2020/2021, I then examine some examples of how highly qualified professionals interpreted and positioned themselves as working subjects in contemporary Cuba (Sections 4 and 5). The interviewees' references to discourses and especially to the subject position of *victim/loser* serve as heuristic devices for the analysis and presentation of the results. I summarize the main results in the conclusion (Section 6), where I again address the question of the suitability of *interpretive subjectification analysis* in the analysis of the Cuban context: for the present analysis, the approach has proven fruitful. Furthermore, its extension beyond the Western context allows for a different perspective on subjectification processes, which in turn contributes to the advancement of this approach. [4]

2. Methods and Data

2.1 Methodological considerations

The inconsistent use of terms and definitions in the diverse literature on subjectification[2] can be confusing. When using notions such as *subjectification* or *technologies of the self,* it is often unclear if authors want to emphasize discourse- or individual-related processes, or the interplay of both. The terminology used in the subjectification approach mentioned above, which is referred to as *interpretive subjectification analysis* (e.g., BOSANČIĆ, 2014, 2016, 2018, 2019; BOSANČIĆ et al., 2019; KELLER et al., 2012), provides some clarity in this regard. In this conceptual framework, subjectification is understood as the "interrelatedness or entanglement of normative subject orders and subjective self-relations" (BOSANČIĆ, 2019, p.88)[3]. In other words, subjectification is a two-sided process: it includes socially/discursively constructed subject positions, as

and reforms in terms of social policy and institutions.

2 These authors are not necessarily concerned with the working self (only), but also with other possible forms of self-reference (i.e., the bodily/physical, sexual and intimate self, see BOSANČIĆ, 2014, p.170).

3 There are also some terminological inaccuracies in this approach, for example, regarding the alternating use of the terms *subjectivation* and *subjectification*. This inconsistency is probably mainly due to translation issues: the approach originates from the German-speaking world and there seems to be no standard translation for the German term *Subjektivierung*. For the sake of consistency, I exclusively use the term *subjectification* in this article.

well as individual modes of self-positioning (for a framing of this approach in the broader field of discourse and subjectivation research, see, e.g., GEIPEL, 2019). [5]

Subject positions are understood as discursively generated "identity templates" (BOSANČIĆ, 2018, p.190) that instruct "addressees to shape their self" (ibid.). In any kind of discourse, examples of typical subject positions are "heroes, rescuers, problem cases, sensibly and responsibly acting individuals, villains and so on" (KELLER, 2011, p.58). Such subject positions reflect underlying social norms of (self-)interpretation that are mediated through discourses. These subject positions, which are a form of *positioning through others*, affect individual modes or processes of self-positioning. *Self-positioning* can thus be understood as the process of dealing with or reacting to discursively generated subject positions. In the literature, there are a variety of terms and concepts that correspond to the concept of self-positioning.[4] For the empirical analysis in this article, I understand self-positioning first and foremost as a process of (self-)interpretation and self-formation that is assumed to, in one way or another, relate to discursive subject positions. [6]

In this approach to subjectification, discursively processed subject positions guide or influence processes of self-positioning*, but* they do not determine them. Human actors, as the target of subjectivation instructions, "are more or less free when they are adopting or referring to subject positions [...] [, and] possible reactions to interpellations have a wide range from affirmative adaption, adaption in parts, to misinterpretation or ignoring the interpellation" (BOSANČIĆ, 2018, p.190). As described by BOSANČIĆ (2014, 2016, 2018, 2019), epistemologically speaking, this understanding of subjectification combines post-structuralist concepts of subjectification, as elaborated by FOUCAULT (e.g., 1988) and BUTLER (1997), with the identity concept of the interpretive paradigm of sociology, drawing especially on MEAD's (2009 [1934]) conception of the self.[5] Indeed, a common feature of these approaches is the assumption "that the human self, the mind or in general this kind of 'inner space' is an instance of self-reflexivity which is bound to 'outer' symbolic orders, materialities and time and space relations" (BOSANČIĆ, 2018, p.192). Identity is thus understood here as a form of self-awareness of individuals or subjects (whereby the categories *subject* or *individual* are broader and thus less tangible concepts), which is, however, conditioned by social norms. Hence, subjectification or self-shaping processes (understood as processes of identity positioning) are a product of *outer* symbolic orders as well as *inner* self-reflexivity. Very simply put, the preceding considerations can be summarized in the following formula: *Subjectification* = *subject positions* + *self-positioning.* [7]

4 BOSANČIĆ (2018, p.191) gave the examples of "self-formation, self-relation, actual subjection, self-interpretation or technologies of the self." He pointed out that "[d]espite the differences of the notions, most of the theorists invoke a concept of identity in some way when they talk about the processes on the level of lived subjectivities" (ibid.).

5 BOSANČIĆ (2014, 2016, 2018, 2019) claimed that this is unconventional because post-structuralist and individual-centered approaches are usually juxtaposed.

The conception of subjectification as a two-sided process entails that the empirical analysis of subjectification must also include both components. Thus, in this article, I consider two types of empirical data to approach the interplay of normative orders and self-relations of highly qualified professionals in Cuba. I examine the two types of data in a two-step analysis. First, I identify the subject positions directed at Cuban workers based on an analysis of discourses revolving around the Cuban realm of work. Second, I rely on transcripts of qualitative interviews conducted with highly qualified professionals in Havana to reconstruct these workers' self-positioning modes and to examine whether and how they related to subject positions. In the methodology of this article, I combine discourse and interview analysis, which integrates the analysis of empirical subjects within social orders of knowledge, and thus facilitates an analysis of the circulation and transformation of these orders (BOSANČIĆ, 2014, p.197). [8]

2.2 Methodological procedure and data basis of the discourse analysis

The discourse analysis presented in this article is based on the sociology of knowledge approach to discourse (KELLER, 2005, 2013). When assembling the data corpus, I focused on capturing a qualitatively broad spectrum of so-called fragments[6] of contemporary discourses about the Cuban realm of work. Following theoretical sampling procedures[7], I took special care to obtain a heterogeneous sample representing different sources of discourse fragments and actors. Therefore, the corpus is not limited to particular media or document types but includes diverse discourse fragments from 2010 to 2021[8]. I conducted a focused search in a database of 429 documents (most of which are text documents) compiled for a previous discourse analysis concerned with issues of distributive justice in the Cuban realm of work and welfare (JANY, 2021). Thirty-two additional fragments accessible on the internet (dealing with the *inverted pyramid*, Cuban highly qualified professionals, and related topics) complement the data corpus for the present analysis. For analytical and illustrative purposes, I distinguished between two main types of discourse fragments: 1., what I call *state-dependent* fragments, such as articles in the state-controlled media[9], legal texts, party resolutions, policy and action programs; 2., what I refer to as *state-independent* fragments, that is, national and international media content[10], as well

6 A discourse fragment is a "statement-event (utterance) in which discourses are more or less comprehensively actualized (e.g., a text); [and the] principal database for analysis" (KELLER, 2013, p.73).

7 In line with KELLER's (2013, pp.95-101) guidelines on corpus building and the selection of data, which are based on ideas of theoretical sampling from grounded theory methodology (e.g., CORBIN & STRAUSS, 2008).

8 This time frame is based primarily on the consideration that various socio-economic reform processes were discussed and initiated in this decade, starting with the *actualización del modelo economico y social* [update of the socio-economic model] in the early 2010s, up to the *ordenamiento monetario* [new monetary order] launched in 2020/21. Among the goals of these reforms, in the words of state-dependent fragments, is to *eliminate the inverted pyramid* (i.e., to establish a different earnings hierarchy). The complete list of documents that make up the corpus is available upon request.

9 For example, *cubadebate*, *granma*, *trabajadores*.

10 For example, from online media such as *elTOQUE* (a multimedia platform run by a collective of Cuban journalists and bloggers, the *Colectivo Más Voces Foundation*, legally registered in

as (international) common and academic literature about Cuba. The in-depth analysis of these discourse fragments was based on methodological proposals for grounded theory methodology (CORBIN & STRAUSS, 2008) that have been adapted for discourse analysis (KELLER, 2013). Methodological procedures involved open, axial, and selective coding, as well as memos and comments. The driving question for the analysis was: What subject positions can be identified for Cuban workers, and especially highly qualified ones, in the discourse fragments? Certain key passages identified during the coding analysis underwent further scrutiny using sequence analysis. [9]

2.3 Methodological procedure and data basis of the interview analysis

To analyze if and how self-positioning modes of Cuban professionals relate to discourses and subject positions reconstructed in the discourse analysis, I used the transcripts of 12 problem-centered interviews (WITZEL, 2000; WITZEL & REITER, 2012) conducted with highly qualified professionals in Havana in late 2020/early 2021. Interviewees were selected either from a pool of participants in an online survey conducted between June and September 2020 in collaboration with the Department of Sociology at the University of Havana (and distributed through mailing lists of the latter), or were identified through a snowballing approach.[11] I used a sampling strategy of *least similar cases* with the aim to achieve a high degree of heterogeneity in terms of biographical trajectories, as well as a balanced representation of age groups and gender. In total, I conducted 19 interviews with qualified and highly qualified workers. For the analysis presented in this article, I focused on 12 interviewees who met the criteria of *highly qualified professionals* according to their educational degree and the categorization of the Cuban National Statistics Office (ONEI, 2020). In the case of one university dropout, self-assignment was also considered. The professions represented correspond to occupations that are particularly emphasized in discourse fragments describing the *inverted pyramid,* i.e., doctors and teachers, but also industrial engineers, lawyers, an architect, and a performing artist (further information on the sample can be found in the Appendix).Thematically, the interviews were focused on the interviewees' professional biographies (including decisions and motivations, concepts of work, work satisfaction, future prospects, etc.) and their assessments of the current Cuban realm of work. To adequately account for the relevance structures of the interviewees, as well as to avoid "just mak[ing] simple comparisons of discourses and interviews" (BOSANČIĆ, 2018, p.199), I used open, axial, and selective coding, as well as memos and comments, following grounded theory methodology (CORBIN & STRAUSS, 2008) for the analysis of the transcripts, consistent with the approach for the discourse analysis. Codes were inductively developed based on the general question of how respondents described and explained their professional

Poland: https://eltoque.com), O*nCubaNews* (a U.S.-based news platform founded and chaired by the Cuban-born U.S. entrepreneur Hugo Cancio: https://oncubanews.com), *14ymedio* (a news platform founded and directed by Cuban blogger Yoani SÁNCHEZ: https://www.14ymedio.com).

11 Originally, interviews with people from different provinces were planned; due to travel restrictions during the COVID-19 pandemic the sample is limited to the capital.

biography in the Cuban world of work. Certain key passages identified during the coding analysis underwent further scrutiny using sequence analysis. [10]

3. Discourse Analysis: Subject Positions in Discourses on the Cuban Realm of Work

In the following, I outline some discursive elements and subject positions reconstructed in the discourse analysis; I do not claim they are exhaustive. What follows can be understood as research hypotheses about discourses and subject positions (BOSANČIĆ, 2014, p.271). All translations from Spanish in this and the next section are my own. [11]

As indicated in the introduction, it has been emphasized in many discourse fragments—both state-dependent and state-independent—that Cuba has a (highly) qualified labor force, whose potential is underused and/or undervalued in Cuba. This can be illustrated by the following quote from US author FEINBERG (2016, p.37): "The tragedy of the Cuban Revolution is this: it endowed its citizens with abundant human capital, while it sadly left them bereft of the tools or incentives to gainfully employ their acquired talents." [12]

Summarizing the observations from different fragments, such missing "tools" and "incentives" of the Cuban labor force have often been highlighted. With *missing tools, reference is* usually made to the structural problems of the (state-led, US-sanctioned, and crisis-ridden) Cuban economy. In many fragments, deficient production capacities (lack of infrastructure, materials, efficiency, etc.) that do not correspond to the skills and qualifications of the Cuban labor force were emphasized particularly. Moreover, by referring to missing tools, authors of discourse fragments have also pointed to the everyday problems caused by an economy of scarcity—in Cuba often collectively referred to as the *lucha* [struggle]—, as well as by the disparity between dollar and peso economies.[12] With *missing incentives*, in turn, reference is made to excessive bureaucracy in an infrastructural and legal framework that does not sufficiently allow, promote, and/or reward (private) effort and innovation[13], as well as the prevalence of *amiguismo* [nepotism] and *sociolismo* [corruption]. [13]

Most importantly, with missing incentives, reference is also made to the low and undifferentiated wages prevailing in the state sector in recent decades[14]—in contrast to potentially high incomes from labor activities in other sectors (including illegal activities) but also from non-labor incomes such as remittances.

12 Despite the abolition of the dual currency system in January 2021, the resultant *dual economy* is said to continue, as, in many cases, the Cuban Convertible Peso (CUC) has simply been replaced by the US dollar or other foreign currencies.

13 In the past, a major point of criticism in this regard has been that self-employment is not possible in all professions. However, in August 2021, the list of professions to be performed on a self-employed basis has been substantially extended (in fact, it is now a negative list, which enumerates the professions that cannot be practiced privately).

14 The implementation of the *ordenamiento monetario* [new monetary order]framework in 2020/2021 has resulted in wage reforms that have allowed for greater differentiation within the state wage scales and has raised wages in general. However, at the time of writing, these wage increases are generally said to be offset by inflation.

The resulting occupational (earnings) structure is generally referred to as the *pirámide invertida* [inverted pyramid]. This metaphor likely originates from academic discourses of the 1990s (the earliest reference found in the framework of the present analysis is GÚZMAN 1995, cited by ESPINA, NÚÑEZ & MARTÍN, 1997, p.20), and seems to have spread across all levels of discourse over the past decades. It appears in Cuban discourse fragments (state/government, media, and everyday/popular), as well as in international ones. Typically, the metaphor is employed to describe that qualifications and/or responsibility, performance, and earnings do not align as expected. In other words, it highlights a discrepancy between professions demanding high qualification and/or responsibility, and the low income these professions yield. In the fragments in which the *inverted pyramid* is mentioned, it is usually depicted as unfair and economically counterproductive, and thus undesirable. [14]

In this discursive framework are different descriptions of what Cuban workers are or should be like. As indicated in the following quote by former president Raúl CASTRO, Cuban state workers in general, and highly qualified professionals (doctors, teachers, lawyers, engineers, etc.) in particular, were often depicted (in both state-dependent and state-independent fragments) as *losers* or *victims* of the inverted pyramid:

> "It is also certain that the salary does not satisfy all the needs of the worker and his family, which generates demotivation and apathy towards work, has a negative influence on discipline and encourages the exodus of qualified personnel towards better-paid activities, regardless of the professional level required. It also discourages the promotion of the most capable and dedicated to higher positions, as a result of the harmful phenomenon of the 'inverted pyramid', which means that, generally, the greater the responsibility, the lower the personal income" (2014, n.p.). [15]

While CASTRO did not explicitly refer to highly qualified workers as victims of the inverted pyramid, in his statement he suggested that the "harmful phenomenon" directly affected these workers—and thus, as a consequence, also affected Cuban society and economy (which Cuban politicians and journalists often voice as their main concern). In other fragments, more explicit vocabulary that points to characteristics of victims or losers has been used, such as when there is mention of "injured actors" who "suffer" from the inverted pyramid (MONTES DE OCA MONTANO, 2015). Based on these and similar attributions in several fragments, a first subject position for highly qualified workers can be identified, that in the following I refer to as the *victim/loser* position. [16]

Beyond the victim/loser position, other subject positions can be identified. The *(e)migrant* position, for example, has frequently been mentioned in discussions about brain drain. As indicated in the preceding quote, this concerns not only *emigration abroad* but also *occupational migration* within the Cuban economy. On the one hand, these two forms of (e)migration have been portrayed as the professionals' reaction to the victim/loser position. On the other hand, in many discourse fragments, (e)migration has been depicted as the most sensible course of action and/or the only option of survival for Cuban professionals.

> "To be sure, some highly skilled Cubans—doctors, lawyers, professors and others—are leaving the country in search of opportunity. But many more who are staying in Cuba are opting to leave their jobs because of low state salaries or are taking on second jobs, becoming taxi drivers, waiters and bellhops—jobs involving regular interaction with foreign visitors and their hard currency" (ROBERT H. SMITH SCHOOL OF BUSINESS, 2017, n.p.). [17]

Other subject positions have particularly been depicted in state-dependent fragments. While GUEVARA's (1965) ideal of a "new man" may have faded in recent decades, the Cuban (state) media have continued to paint a picture of, to put it pointedly, an *engaged socialist worker* committed to the goals of the Cuban revolution[15]. Despite (potentially) adverse circumstances, this socialist worker is characterized by his or her honest and hard work, perseverance, and, nowadays, also by his or her self-reliance and self-responsibility—albeit while acting within the framework of the Cuban revolution's goals at all times. This positive template of working subjects is generally directed at all Cuban workers, whether state employees or the self-employed in Cuba's growing private sector[16]. In contrast to earlier periods of the Cuban revolution, the self-employed are nowadays considered to be an important part of this revolution:

> "With their activity, the self-employed show their credentials in the different spheres of the economy and services, as evidenced by the progressive growth of their contribution to the State budget and to the solution of specific needs of the population" (VALDÉS, 2016, n.p.). [18]

Positive archetypes of working subjects are countered by negative examples of what could be referred to as *profiteers* of various kinds. In state-dependent fragments, different examples of *crooks were exposed, who,* unlike the engaged socialist workers, do not distinguish themselves through honest work but instead enrich themselves at the expense of society. Two frequently mentioned examples are *acaparadores* [hoarders], who pinch goods from the state production system, and *revendedores* [resellers], who then sell such goods. *Non-honorable* (as opposed to honorable) *self-employed* are accused of basing their success less on their own work and effort than on contacts and unearned financial resources (in Cuba and abroad), of procuring goods illegally, and/or of selling them at exorbitant prices. [19]

Besides these rather binary subject positions in state-dependent media, in some state-independent fragments a position in between was outlined, which I call the *inventive survivalist.* This position involves that workers in Cuba (must) develop creative ways of dealing with the conditions, limits, and contradictions of everyday social and economic life in Cuba. This may include the breaking of laws or the successful maneuvering between legality and illegality.

15 The Cuban revolution is generally depicted as an "ongoing state political project—event, structure, and process" (GROPAS, 2007, p.533) rather than a one-time event. Although this view is debatable, it is adopted in this article for the sake of simplicity.

16 Since the reforms of the private sector in September 2021, these have even been joined by entrepreneurs of small and medium-sized enterprises.

> "[T]he unending resourcefulness, as well as the innumerable *inventos* (inventions), often technically illegal, that most Cuban citizens have long had to undertake in their daily struggle to *resolver* or "make ends meet." As with the countries of Eastern Europe, this part of the economy—long hidden, but everywhere in plain sight—has been of major importance in the everyday lives of the Cuban people, playing a role in the provision of needed goods, services, and employment" (RITTER & HENKEN, 2015, p.ix). [20]

Finally, I presume that the subject positions encountered in Cuban discourses intersect with subject positions and narratives of global, post-Fordist capitalism. The assumption is that the position of the above-mentioned *entrepreneurial self*[17] or, for example, narratives of meritocracy—such as "from rags to riches"—play a role in the self-positioning of working subjects in Cuba. Since these positions and narratives have already been discussed at length in the literature (as cited, e.g., in the introduction), I will not elaborate further on them here but will return to them when presenting the interview analysis. Essentially, just as in the case of Cuban discourses, the question arises here of to what extent subject positions circulating in Western discourses also shape subjectification processes in Cuba. [21]

4. Interview Analysis: Self-Positioning of Highly Qualified Professionals

In the analysis, it became clear that the interviewees' (self-)narrations could be well represented using references to the victim/loser position described above. On the one hand, the emphasis on this position resulting from the material can be understood as an indication of the (discursive) centrality of Cuban labor and wage hierarchies and their (perceived) injustice. On the other hand, the identity template of the *victim/loser* provides interviewees with a good point of reference to depict their own biographies as more or less successful stories. Overall, the prominence of this position in the interview transcripts seems to support the hypothesis of discursively mediated subject positions (and their transformation in individual subjectification processes) proposed by the *interpretive subjectification analysis* approach. Consequently, I opted to mirror this focus on the victim/loser position in the subsequent presentation of the interview analysis.

17 In the context of the *new spirit of capitalism* (BOLTANSKI & CHIAPELLO, 2017 [1999]) and the *information* or *knowledge society* (e.g., BELL, 1973), the *entrepreneurial self* is supposed to acquire skills and competences autonomously, working creatively and flexibly, and self-optimizing on its employability.

Figure 1: Strategies of self-positioning [22]

Figure 1 shows the strategies of self-positioning that were reconstructed in the analysis. In the present sample, all but one of the interviewees[18] relied on the above-described discursive elements such as the inverted pyramid and particularly on the victim/loser position to describe and explain their own professional biography—with varying frequency and directness. What particularly stood out in the analysis is how the interviewees used these discourse references to emphasize that, and in what way, they *distanced* themselves from this victim/loser position. In the following, I first describe one example of identification and then illustrate three different dissociation strategies, which also contain (partial) allusions to other subject positions. [23]

*L*orena[19], a young architect, provided a clear example of an *identification strategy*. According to Lorena's narrative, she was offered a position[20] in the state sector after completing her studies. After she started working, she realized that this position had little to do with architecture. She did not know what to do there, felt underemployed, and viewed her co-workers as incompetent and unqualified. After about a year, Lorena was able to find a new position in another firm that corresponded to her education and skills, but there were bureaucratic problems concerning the continuation of her social service[21]. This was the reason for her dismissal, she said, a few months after the beginning of the COVID-19 pandemic, at a time when her salary was the only source of income for her household. [24]

The way Lorena used discourse vocabulary suggests that, on the one hand, she sees herself as a classic victim of the inverted pyramid, in which professionals

18 The exception is Ernesto's interview, which fits more into the category of *non-reference*. This category describes the possibility that an interviewee's (self-)narration completely ignores discourses and subject positions. Since non-reference can also be understood as a form of self-positioning, an elaboration of Ernesto's case would be interesting—for reasons of space, however, I will concentrate on identification and dissociation.

19 The names of all the interviewees mentioned are pseudonyms.

20 Via a centrally organized job allocation process for university graduates, whose first working position usually involves a three-year social service.

21 See Note 20.

are "the most vulnerable part of society" (Lorena, §52)[22]. Furthermore, she saw herself more generally as a victim of the Cuban labor system, to which she, at various points in the interview, attributed many of her problems and failures.

> "I felt very disappointed with the, with the system of work in Cuba. ... Because ... I asked myself a lot ... I mean, I asked myself all the time: Is this socialist Cuba, where they say that no one is left without protection?[23]. That nobody is left without work and that, that the state takes care of the people, and so on. This is not true ... They left me without a job, they left me in the street, in a very bad ... economic situation" (§30). [25]

Despite her identification with a victim/loser position, which Lorena used to describe and explain parts of her professional biography, she also used various strategies to partially *dissociate* from this position. This dissociation allowed her to not see herself merely as a passive victim of the Cuban realm of work (and specifically of the inverted pyramid), and to gain agency over her biography. From the experiences described, she concluded that, in the long run, she would leave the state sector and become self-employed. Thereby, she placed her hopes on her artistic projects, which she considered a childhood dream and a rediscovered passion. I call this form of dissociation strategy a *strategy of refusal/denial*:[24] the interviewees referred to a victim/loser position in order to contextualize their professional biographies, but in the course of their narration they also made clear that they were unwilling to accept victimhood, at least in the long run. In most cases, this amounted to abandoning their original profession or at least the position they held at the time in question. This strategy becomes explicit in the following quote from Manuel, a young special education teacher, who categorically ruled out practicing his profession in Cuba:

> "What, what am I going to tell my nephews and nieces, to, to my children that I will have in the future - that I spent from [the age of] 25 to 28 waiting in queues?[25] Well, no. I refuse to do that. ... I refuse, I really refuse that. And I refuse a lot of things that are happening here that I don't, I can't conceive of. So, I'm not going to practice my profession here, for those reasons" (§22). [26]

Parallel to the subject position of the *(e)migrants* described above, Manuel made it apparent that for his future, as for that of many other young people, as he said, he saw no other option than to emigrate abroad. [27]

Another type of dissociation strategy used by interviewees is what I called the *make the best of a bad bargain strategy*. Here, the interviewees identified as

22 The paragraphs cited correspond to the paragraphs of the analyzed transcripts (in MAXQDA). Legend for the interview excerpts: pauses in speech are marked with "..." and omissions are marked with "[...]." If interviewees emphasized words or sentences in particular, this is highlighted with capitalization. Where necessary, the Spanish original is given in brackets.

23 *Nadie quedará desamparado* [No one will be left without protection] is a phrase often used by government members and state-controlled media in the context of ongoing reform processes.

24 Despite the terminological proximity, this designation must not be understood in the sense of a psychological concept/interpretation.

25 Manuel was referring to the queues that are part of many Cubans' everyday lives against the backdrop of recurring crises and the economy of scarcity.

professionals and, to a certain extent, accepted their fate in the Cuban realm of work, as they did not completely refuse to practice their profession. Instead, they said that they focused on the benefits of their profession. Some emphasized material benefits, such as a company vehicle or the possibility to buy goods at the workplace cheaply and without much effort (e.g., in the form of a so-called *jaba*, a bag of food that is given to employees at a discount). In this context, some of the interviewees also stressed that they simply gained advantages for themselves—in semi-legal or illegal ways—by, for example, pinching goods or deliberately being absent from the workplace. Some of them understood this kind of vigilante justice as a silent protest against their situation as professionals in Cuba. Others identified with the position of inventive survivalists: those who want to survive in the Cuban realm of work must be creative. On the other hand, several interviewees who used the *make the best of a bad bargain strategy* also emphasized the intangible benefits of their profession, such as social contacts, the gratitude of beneficiaries, or the possibility to practice their passion—even if under less-than-ideal conditions. The quote from Caridad, a general practitioner who had practiced her profession in Cuba for 20 years, reflects these aspects:

> "So as far as that is concerned, I repeat, these are ... uhm, uhm, experiences that, that generated a dissatisfaction in me, even though I still love the career of medicine (laughs), I still like it and I really enjoyed the work. And I enjoyed a lot; nowadays I have patients who … uhm, ah! You don't remember, but once my son came in very ill and you treated him and thanks to that. It makes you very happy. And for that part at least you feel, well, uhm, uhm, satisfied with what you did" (§19). [28]

Finally, another strategy that allowed interviewees to dissociate from a victim/loser position can be referred to as the *entrepreneurial strategy*. Here, the interviewees used discourse vocabulary mainly to depict the problems of the Cuban realm of work in general or for other people. This enabled them to describe how *they* differ from these other people: they escaped victimhood owing to, as they emphasized, their own efforts, performance, willpower, etc. For instance, Juan, a trained surgeon, said:

> "I repeat, the idea of the doctor is that the only thing they can do is to be a doctor. And that is why you see them there, why, why they don't do anything else. And they are frustrated" (§70). [29]

However, Juan made it clear that he did not consider himself to be one of those frustrated doctors. After several years in the profession (which he saw as a vocation, but in Cuba mainly as a source of numerous frustrations), he requested his dismissal to pursue another job in the state sector (outside of the medical field), with better working and pay conditions. Later, he started working in the private sector as a taxi driver for tourists. Overall, Juan viewed his professional biography as mostly a success story, crediting his own efforts, decisiveness, and willpower as important factors. [30]

Similar to Juan, the young performing artist María also recounted a success story based on the idea of personal effort. What distinguishes María from Juan (and in

principle from all other interviewees in the sample) is that she attributed the problematic position of professionals less to the Cuban (labor) system or "the government" as others did. According to her, the problem is instead rooted in a general loss of social values and in the attitude or the stance that the professionals maintain towards their work:

> "There are very few people who ... who value their profes-, uhm, their pofies-, uhm profession, sorry. Who ... fight for it, who defend it. Who ... maintain a good attitude [*actitud correcta*]. [...] There are many people who say that they don't, uhm, the problem is that ... we are not in a capitalist country. ... That's the concept, isn't it? If ... your earnings were based on the work you do ... it would be different. And I don't see it that way. It's a problem of, as I already told you, education, ethics, values. A COMPLETE ... degenerative loss of the generation we are living in" (§25). [31]

Her argument about the loss of values in her generation allowed María to distance herself from this: she fought for her profession (which she loves, as she said), and had, as someone "from the street" (§30), prevailed against many others to get her place at art school and to be where she is today: "My slogan is, when you want to do it, you can do it" (ibid.). Altogether, María mainly used discourse vocabulary to distinguish her biography and her perspective from those of other people and from the common understanding of the current Cuban realm of work, the victim/loser position, the inverted pyramid, etc. Her self-representation, a narrative of ascent *par excellence*, also drew on various aspects of the positions of the engaged socialist worker and the inventive survivalist. Here, I also detect connections to the previously mentioned subject positions circulating in Western discourses. Maria's autobiographical accounts resemble the meritocratic "from rags to riches" narrative—even if the word "riches" would have to be reframed for the Cuban context. On some points, the narratives of both Juan and María are also reminiscent of the figure of the *entrepreneurial self*, with its associated appeals for self-optimization, flexibility, and self-responsible work. [32]

5. Discussion of the Interview Analysis

In summary, for most of the interviewees, the discursive subject positions reconstructed in the previous section, and particularly the victim/loser position, were an important tool for narrating their professional biography. Identifying with or dissociating from these positions allowed the interviewees to tell a "success story" or a "sad tale" in the sense of GOFFMAN (1961, pp.150-151; see also BOSANČIĆ, 2014). Interestingly, both narrative forms and strategies of identification and dissociation appeared simultaneously in many interviews. Nonetheless, most interviewees in this sample distanced themselves from victimhood rather than identifying with it. The analysis provided evidence that the subject position of the Cuban inventive survivalist served to construct a distance from victimhood, that is, the expectation that Cuban workers must and will develop creative ways of dealing with the problems and contradictions of the Cuban realm of work. The analysis further revealed that interviewees told a success story that reflected professional narratives of performance and

meritocracy. These narratives can also be understood as social and discursive expectations towards workers and specifically towards professionals (in Cuba, as in other countries). These expectations seem to have been internalized by some of the interviewees: they identified as highly educated and qualified professionals that could not *let themselves down* and let fate determine their lives, but had to instead do everything in their power to improve their situation. [33]

Finally, the analysis revealed that the telling of success stories by means of the above-described dissociation strategies can be related to further categories that were identified, that is, to context- and individual-related factors that are not necessarily directly connected to discursive subject positions. Financial security, for example due to remittances from abroad or some form of *negocio* [business][26], encourages dissociation from the victim/loser position. Likewise, the desire for distinction led some interviewees to use dissociation strategies to place their professional biography in a unique light—and thus to describe how they were different from other professionals in Cuba, as is the case with Juan and María. What is more, various interviewees cited self-fulfillment and satisfying their passions as a central aspect of their occupational biography. Success in this encouraged the use of dissociation strategies from the victim/loser position—and thus enabled the interviewees to tell success stories. In contrast, if their aspirations could not be realized, interviewees instead identified with the victim/loser position and told sad tales—at least in part. [34]

In the introduction, I addressed the question of the legitimacy and usefulness of applying an approach developed in the Western world to the Cuban context. The preceding interview analysis appears to confirm the assumption that the concept of the *working self* is also pertinent in Cuba. The concept manifests both parallels with and differences from its Western counterparts. In this context, it is worth noting that discursive narratives in Cuba (be they governmental, ideological, scientific, popular, etc.) have long intersected with Western narratives, including aspects of Marxism and global capitalism. In this regard, as a researcher from Europe, it also seems appropriate to address my own perspective and reflexive positioning. My origin has certainly influenced the choice of methodological approach. Nonetheless, Cuban researchers, with whom I discussed the research underlying this article, supported the approach via discourse and subjectification analysis. [35]

26 In Cuba, the term *negocio* is often used in everyday language as an umbrella term for legal, semi-legal, or illegal activities that generate additional income to that from one's profession.

6. Conclusion

In this article, I have analyzed subjectification processes of highly qualified professionals in Cuba and presented them as two-sided: as an interplay of discourses and self-interpretation/self-formation of subjects. This understanding of subjectification is based primarily on the premises of *interpretive subjectification analysis*, which provides a coherent conceptual and definitional framework for subjectification analysis. While I emphasize the importance of discourse structures (particularly in the form of subject positions) by using this approach, it also allows subjects to be granted room for action (in the process of self-positioning). Although *interpretive subjectification analysis* has its origins in a Western context, this article provides evidence that the approach is equally fruitful for the analysis of (self-)positioning processes of highly qualified Cuban professionals: I was able to show how the interviewed professionals related to certain discursive subject positions outlined in a previous part of the analysis.[27] [36]

The victim/loser position turned out to be a central theme in this analysis. Therefore, the self-positioning processes of the interviewees were demonstrated primarily by identifying with and dissociating from this position. I also briefly presented other subject positions that the interviewees drew on for their self-interpretation and self-presentation, such as the *engaged socialist worker*, the *inventive survivalist*, as well as meritocratic narratives. Through this analysis, I have provided evidence that the interviewees' "creative engagement with subject positions" (BOSANČIĆ, 2019, p.94) is characterized mainly by combining different strategies of identification and dissociation as well as referring to different subject positions. In contrast to BOSANČIĆ (2014), who studied a homogeneous sample regarding the workers' milieu and workplace, the heterogeneity of the Cuban sample led to further observations on possible interplays between modes of self-positioning and other (e.g., biographical or habitus-related) characteristics of the interviewees. Thus, circumstances beyond discursive vocabulary and subject positions, such as financial security and the interviewees' desire to distinguish themselves from others or to satisfy their passions, also contributed to the interviewees' self-interpretation and self-presentation. [37]

The latter leads to a final observation whose closer examination could be an interesting starting point for further research: despite the peculiarities of the Cuban case, there are some parallels to Western, post-Fordist contexts, both on the discourse level and the subject level. On the discourse level, for example, narratives of state slimming, the flexibilization of work, and the transfer of responsibility to individuals can be identified.[28] At the subject level, it is noticeable that many of the interviewees emphasized aspects of self-fulfillment and passion when recounting their professional biography. For some, narratives of ascent and

27 In light of the above considerations on the specificity of the Cuban context, however, this does not allow any conclusions to be drawn as to whether this holds true for other contexts or strata. Exploring this question would require further investigation.

28 For example, as indicated, the present-day *engaged socialist worker* should act autonomously, self-responsibly, and be less dependent on the state.

self-optimization also played an important role. Nevertheless, the premises and results of subjectification analyses concerned with the discursive subject of the (neoliberal) *self-entrepreneur* cannot simply be transferred to the Cuban context. Instead, further analyses of the *engaged socialist worker*, for example, would have to take into account the peculiarities of Cuban discourse vocabulary. Hopefully, the results presented in this article will help to pave the way for further analyses of subjectification processes in the Cuban as well as other contexts, and possibly in a comparative framework. [38]

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Appendix: Outline of the Interview Sample

Pseudonym	Sex	Age	(Original) Profession	Brief summary of occupational biography
Caridad	w	48	Doctor	Worked for twenty years as a general practitioner; quit in 2016. Emigration plans.
Juan	m	49	Doctor	After his studies and specialization as a surgeon, he worked in his specialty for nine years. Then further education and eight years of employment as an inspector in a state firm (not in the medical field). Since 2018, he is a taxi driver for tourists (private sector).
Dayana	w	28	Doctor	Has worked as a general practitioner since graduation.
Isabel	w	59	School teacher	After her studies, she worked as a teacher (mathematics, art) for about twenty years. In parallel, she started baking and selling pastry in 1990. Since 2011, she has been working exclusively as a rental agent for tourists. She has been selling pastry again since the beginning of the pandemic.
Alfredo	m	46	School teacher	After his studies, he worked as a teacher (English) for five years. Language training; informal jobs in parallel. Since 2000, various jobs in the tourism sector (state sector). Simultaneously began to study again. Started to work as a teacher again during the pandemic.

Pseudonym	**Sex**	**Age**	**(Original) Profession**	**Brief summary of occupational biography**
Manuel	m	26	Special education teacher	Three years of language studies, then dropped out. Worked as a school teacher for about a year. Worked in bars/restaurants for three years, in parallel started studying special needs education. Worked in another country for a few months in 2019, returned in 2020 due to the pandemic. Finished special education studies during the pandemic.
Estela	w	26	Jurist	After her studies, position (social service) in legal advice (state sector), quit after a few months. Worked in bars/restaurants for about three years. Worked as legal adviser for a private firm during the pandemic.
Ernesto	m	42	Jurist	After school, four years of unskilled work in different areas (state sector and private sector); informal jobs in parallel. Further education and two years of employment in a bank (state sector). Four years of unskilled work in gastronomy/informal jobs (private sector). Six years of unskilled work in a state firm; law studies (evening school) in parallel, successfully completed but has not worked in the profession. Worked for approx. 5 years as a tourist guide (state sector). Unemployed since the beginning of the pandemic.
Mario	m	58	Industrial engineer	Since graduation has worked in ten different state firms; different positions and responsibilities (technician, specialist, manager).
Pavel	m	26	(Industrial engineer, *dropped out*)	Three years of industrial engineering studies, then dropped out. Further training in different areas, in parallel worked as a cleaner. Two years of unskilled work in gastronomy (private sector), until the beginning of the pandemic; in parallel has resumed studies.
Lorena	w	26	Architect	After graduation, position (social service) in the state sector for one year. Changed to another company (in parallel part-time work for a private real estate company). During the pandemic, she was dismissed and found a new job after a few months. Has plans to become self-employed in the artistic field.

Pseudonym	Sex	Age	(Original) Profession	Brief summary of occupational biography
María	w	23	Performing artist	Studies and simultaneous work in the profession (state sector). During the pandemic, "experience" in agriculture (self-employed and working in a cooperative). Working as an artist again since late 2020.

Table 1: Outline of the interview sample

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3 Conclusion

By addressing different facets of the Cuban case, the initial goal of this research was to shed new light on the topic of work (e)valuations. In exploring this case, I sought to contribute to the literature by offering a comprehensive approach that integrates different perspectives on the (e)valuation of work, its implications for perceptions of distributive justice and for identity formation.

Figure 5: Overview of the articles' perspectives. Source: Created by the author.

The leading research question was **which definitions and (e)valuations of work, related principles and notions of justice, as well as modes of subjectification can be found in the discourses, *dispositifs* and individual perceptions and strategies in the Cuban realm of work.** The four articles composing the present thesis explore different facets of this question in the Cuban context (Figure 5) and, whenever possible, draw parallels with previously studied market capitalist and state socialist settings, thus contributing not only to the Cuba-specific literature but also to the international literature on the (e)valuation of work, distributive justice, and identity formation. Table 7 summarizes central findings from the four articles.

	Article A	Article B	Article C	Article D
Title	***Trabajo Decente*? Decent Work from a Cuban Perspective** (Izquierdo and Jany 2020)	**The 'Economic Battle' Now and Then: (E)valuation Patterns of Distribution in Cuban State-Socialism** (Jany 2021)	**The 'Inverted Pyramid' and Beyond: Perceptions of Distributive Justice among (Highly) Qualified Workers in Contemporary Cuba** (Jany and Budowski 2024)	**Subjectification of Highly Qualified Professionals in the Cuban Realm of Work: Analysing a Two-Sided Process** (Jany 2024)
Scope	Institutions and labour policies in past and present Cuba	Framework of institutions and political leaders' views in two periods of time (early 1960s and 2010s)	Workers' perceptions of distributive justice in contemporary Cuba (Havana)	Subjectification processes of highly qualified professionals in contemporary Cuba (Havana)
Central findings	• The promotion of Decent Work principles as a necessary, but not sufficient prerequisite to realize conditions of decent work; • The current reality of Cuban labour institutions, relations and working conditions hardly conforms to the intentions of Cuban social and labour policies; • "Commercialization of labour": understanding of work primarily in economic or commercial rather than in social terms.	• Equity, functional needs, and other allocation rules are compatible with 'egalitarian ideology' (generally translated as outcome equality and non-functional need rules), but rather integrated into it – and, in some cases, are used to criticize and update parts of it; • The investigation illustrates that "equality may be conceptualized in a variety of ways, [therefore] it is important to […] [be] explicit about the specific (sub-)type of equality at hand" (Törnblom and Kazemi, 2015: 30).	• Broad support for wage differentiation based on equity principles among the interviewees, but we also find reasoning patterns based on principles of need and even equality (reintregration of the patterns); • Interviewees mainly rely on two patterns to explain why they perceive equity violations as unjust: "blaming structures" or "blaming individuals" → may be linked to people's attitude towards the country's political system (preliminary finding).	• Discursive subject positions identified: victim/loser of the 'inverted pyramid', engaged socialist worker, inventive survivalist, meritocratic narratives; • The interviewees' "creative engagement with subject positions" (Bosančić, 2019, p. 94) is characterized mainly by combining different strategies of identification and dissociation to the victim/loser position; • Parallels to Western, post-Fordist contexts.

Table 7: Overview of central findings. Source: Created by the author.

In the following, I conclude by addressing the question of whether and in which way the Cuban realm of work can be considered as a 'special' case regarding work (e)valuation and its implications for perceptions of distributive justice and for identity formation. I deliberately choose the term *special case* here, even though case study literature more commonly refers to 'anomalous cases' (Burawoy, 1991; 1998), 'unusual', 'extreme' or 'crucial cases' (e.g., Flyvbjerg, 2006; Gerring, 2017; Yin, 2014). 'Special' seems to be an appropriate umbrella term for different characteristics of these concepts, emphasizing that a special case is one from which we can draw valuable insights.

3.1 Cuba, a 'special' case regarding work (e)valuation? Contributions to the literature

On the basis of the findings presented in the four articles, it can be stated that the Cuban realm of work presents some historically evolved peculiarities that are reflected in the discourses, *dispositifs*, individual perceptions and strategies examined within this research. At the same time, the results of the research show many parallels with existing international research. In what follows, I summarize some of these differences (Cuban idiosyncrasies), as well as similarities with previously studied contexts.

In terms of idiosyncrasies, the social and labour policies that emerged from the revolution since the early 1960s, as discussed in articles A and B, are particularly noteworthy. These include, in particular, wage policies for the state sector with centrally fixed wages (with minimal to no worker or trade union involvement in the decision-making process on wage levels or structures) and limited differentiation (including both time-based and performance-based wages). As authors have emphasized (e.g., Domínguez et al., 2017), these wage policies need to be understood in the context of broader social policies and redistribution efforts (e.g., free education, social protection, subsidies and distribution mechanisms). Over the years, economic crises – the causes of which are attributed to internal, external or both factors, depending on the author – have led to the growing importance of economic sectors operating alongside the state sector, whether legal or illegal. This trend seems to have intensified with the developments since the COVID-19 pandemic, as briefly addressed in Chapter 1.6, including the sharp worsening of the crisis and the reduction of social redistribution and subsidies.[36]

The 'inverted pyramid' investigated in the present research serves as a prime example of a historically established interpretive pattern. It is deeply embedded in Cuba's general symbolic framework and therefore frequently referenced in academic, political, media and individual statements. It forms the basis of some of the subject positions conveyed in discourses (particularly the victim/loser position identified in this research) and, consequently, of individual self-narratives.

[36] The question of how the increase in social inequalities influences discourses, discursively mediated valuation patterns, and individual and institutional reasoning examined in articles B, C and D, is beyond the scope of this research. However, the findings may inform future research on work (e)valuation in Cuba, as discussed briefly in Chapter 3.2.

Another noteworthy aspect is the link between equity perceptions and interviewees' attitudes towards the political system, as concluded in article C. This result fits well with existing research on justice inferences (e.g., Mijs, 2018). Further research would be needed to corroborate our hypothesis and to include additional categories in the analysis, such as the financial situation and sources of income, age, race or gender. In this context, it is worth noting that gender issues were only partially addressed in this research, explicitly in article A. Despite the publicly promoted priority of gender equality policies in Cuban politics and the low level of gender discrimination in social institutions, we identified existing gender gaps in various dimensions of labour force participation (e.g. in the state and non-state sectors, crisis impact, gender segregation in activities/occupations, access to seed capital, etc.).

The finding that work in the reproductive sphere is highly gendered and generally undervalued compared to work in the so-called productive sphere enabled connections with other elements of this case study and points to similarities with other contexts around the world. Many of the findings of this case study – based on the existing literature, the examination of discourse fragments, the online survey and the interviews with workers – suggest that the understanding of work in Cuban discourses, policies and institutions is primarily framed in economic or commercial terms rather than in social terms. To use Budd's (2011) distinction of understandings of work, work seems to be understood primarily as a commodity. Conceptions of work as a social relationship or as caring for others tend to remain in the background – although they emerge momentarily in discourses, *dispositifs* and self-narratives, alongside other perspectives on work such as occupational citizenship or personal fulfillment.

Overall, the findings of this research suggest that studying the 'special case' of the Cuban realm of work— if one chooses to label it as such — reveals many parallels to other contexts and is consistent with existing international research. Indeed, many previous findings can be corroborated by the Cuban case. Particularly noteworthy in this regard is the central role of the principle of equity (achievement, merit, etc.) as a framework for orientation and (e)valuation, in discursive and institutional(-ideological) contexts, as well as in individual patterns of argumentation and (e)valuation.

The overarching principle of distribution according to contribution (*nota bene* within the so-called productive sphere) is highly present in discursively mediated (e)valuation patterns as well as in institutional and individual reasoning. The arguments relating to the 'inverted

pyramid' analysed in this study illustrate, among other things, how market- and performance-oriented wage and labour policies are presented in different contexts as an inevitable consequence of (universally valid, immutable) economic imperatives. As (Menz, 2005) has already noted for the German context, such policies are therefore seen neither as fair nor unfair, but rather as objectively necessary.

As outlined in Chapter 1.4.2, international research has shown that the broadness and "flexibility of the original equity formulation" (Fischer, 2016, p. 467) allows for a range of interpretations of what is considered as valuable work (for individuals, collective actors, or within discourses and ideologies). This finding is supported by the results of this research in the Cuban context, which corroborate a multi-principle approach rather than a 'pure' equitarian approach. This suggests that there is no single principle of equity and that equity is not necessarily in opposition to other principles such as need or equality; rather, these principles are often compatible. In the same manner, as detailed in article B and touched upon in articles C and D, little evidence was found to support the 'dominance of egalitarian principles' in the Cuban state socialist context.

As further demonstrated by the analysis of (e)valuation patterns in the Cuban realm of work, equity serves both as a broad framework for establishing normative expectations and as a basis for criticizing perceived injustices. The findings from the online survey and individual interviews conducted within this research support the notion of a dual role for the principle of equity (which probably applies to other justice principles as well): equity has both "integrating and disintegrating" effects (Dröge, 2015). In other words, it functions simultaneously as a tool for legitimizing and criticizing perceived (in)justice. In the context of the 'inverted pyramid', numerous examples illustrate how the equity principle is used to criticize an egalitarian wage system. At the same time, Cuban workers rely on this principle to legitimize their comparatively higher earnings in non-state sectors and, by extension, their own 'success'. Interestingly, similar to 'Western European' contexts where critiques often highlight a perceived 'erosion of the equity principle' – as in the case of high executive salaries or the earnings of professional athletes – similar but contextually adapted critiques (fitting the Cuban interpretive framework) can be observed in Cuba. As discussed in article C, figures such as *revendedores* [resellers] who siphon off goods from the state sector to resell on a large

scale, or *reggaeton artists*[37] who achieve success 'regardless of work/performance/merit', are frequently criticized in discourses evolving around the equity principle. These critiques reflect a perceived divergence from equity-based justice and resonate strongly with Cuba's specific interpretive frameworks.

Regarding specific interpretations of equity, analyses of (e)valuation patterns across the different data sources of this case study suggest that equity-based reasoning typically relies on broad and flexible categories, such as qualification and/or effort/performance, which likewise allow for various interpretations. As shown in article A, since the early years of the revolution, the centrally fixed unified state wage system has been divided into a basic wage and the so-called stimulus. This stimulus (bonus), as in other contexts, is often associated with feelings of insecurity and injustice among workers, especially as the achievement of performance criteria is not always – or only indirectly – under their control (see detailed discussion in article A). Nevertheless, a certain emphasis on performance-related pay can generally be discerned in past and present (e)valuation patterns in political and legal *dispositifs*, as well as in the perspectives of political leaders (as portrayed by the media), albeit often intertwined with other principles.

As this research has shown, the tendencies (or directions) of such arguments within the state-ideological framework can be reconfigured over time (in the Cuban case, this was referred to as 'updating'). Moreover, both individual and state-ideological reasoning and (e)valuation patterns are often accompanied by apparent contradictions: justice-based arguments are not always clear-cut, and different (seemingly contradictory) principles of justice can coexist within the same argument. As previous studies have highlighted, justice-based reasoning intersects with factors such as socialization, class, age, gender, etc.; as noted above, for the Cuban case, we hypothesized that it might also coincide with political orientation.

Finally, the present research illustrates how societal conceptions of justice, in the broader context of discourses and subject positions (as calls on individuals to think or act in a certain way), serve as frameworks for individuals' self-narratives and thus for the formation of their

[37] Reggaeton artists were not explicitly mentioned in article C, as they appeared less frequently in the discourse fragments I analyzed. However, during my research stay, I noticed that this figure was often used as an illustrative example in everyday conversations and arguments about justice and equity. Similar examples include the children of politicians (who, for instance, achieved economic success in the non-state sector), politicians themselves, or high-ranking military officials.

identities. Building on the existing literature on subjectification, article D emphasizes that individuals have the agency to engage creatively with these frameworks, especially the subject positions conveyed in discourses where different forms of identification with and distancing from subject positions can be identified. Issues related to the working self have primarily been studied in market capitalist contexts. Studying this issue in the Cuban context, on the one hand, enabled a methodological contribution to the literature on the interpretive analysis of subjectification. On the other hand, it allowed the identification of 'specifically Cuban' subject positions linked to past and present discourses of justice (e.g., the victim/loser of the 'inverted pyramid'). Particularly in terms of modes of subjectification of (highly) qualified workers, certain parallels with Western, post-Fordist contexts could be hypothesized – although to assert this with certainty would require further investigation, which I briefly discuss in the next chapter.

Overall, this research suggests that the aspects of the Cuban realm of work studied can be considered 'special' in some respects, such as the historically developed wage and distributional *dispositif*, as well as some specific (discursive) patterns of interpretation, (e)valuation and subjectification associated with it – all in the context of an ongoing (and, at the time of writing, intensifying) crisis. At the same time, there are many parallels with findings from research in other contexts, both in terms of interpretations and reasoning about labour market (in)justice at different levels of society, as well as in terms of subjectification and identity formation based on the working self. The study of the Cuban case allowed for contributions to theoretical, empirical, and methodological research on (e)valuations in the realm of work by drawing on various perspectives (micro and macro perspectives; discourses, *dispositifs*, and subjectification; different theoretical and methodological approaches; as well as differences and parallels to existing research).

3.2 Limitations and perspectives of the research

As explained in the introduction of this framework text, shortly after I had started the field research in Cuba, the COVID-19 pandemic emerged, which added a 'layer of specificity' to the case study. This unforeseen situation required significant adaptation of the fieldwork, as well as underlying research questions, which in some instances had to be done rather hastily (e.g., when we decided to design and carry out the online survey). It should also be borne in mind that statements in the individual interviews were made in the specific context of the pandemic

and were therefore likely affected by the immediate economic, social and emotional challenges of this exceptional situation. This may mean that these narrations are less indicative of non-pandemic times and rather reflect the extraordinary conditions of this specific crisis. The exceptional situation caused or aggravated by the pandemic crisis has continued, leading to a rapid pace of change. Only a fraction of these recent developments could be briefly addressed both in the last published article C and in Chapter 1.6 of this framework text. Consequently, the findings presented here reflect a snapshot of a rapidly evolving situation, which do not necessarily extend to the more recent shifts that have occurred since the fieldwork was completed.

Based on the present findings, it can be assumed that patterns and perceptions of distributive justice (from governmental and individual perspectives), subject positions, and strategies of self-positioning in Cuba may change in response to these recent shifts. This could affect the perception and (symbolic) valuation of entrepreneurship as well as its economic evaluation in monetary terms. To what extent might skills and education increasingly be evaluated through a market lens that focuses on output and revenue generation rather than alignment with state-defined social goals? How will increasingly difficult and unstable working conditions affect the structure of the Cuban labour market and workers' individual strategies? In the context of a reinforcement of the ‘survival economy’, will traits such as resilience, adaptability, and informal hustles be re-evaluated, and if so, how? These and other questions could be explored in future research based on the findings of this study.

As mentioned in the introduction, the original plan to conduct (group) interviews in different locations in Cuba was compromised by the COVID-19 pandemic. As a result, I conducted individual interviews exclusively with workers in Havana. This limitation makes it particularly difficult to generalize the findings of the interview analysis to a broader ‘Cuban case’, especially given that all the interviewees were (highly) qualified workers. I have been transparent about this in articles C and D, and have framed both the research questions and the presentation of the findings accordingly.

Taking these considerations to another level, the very construction of a ‘Cuban case’ for research purposes, as undertaken in this research, can be questioned. On the one hand, such an approach may improve our understanding of the Cuban realm of work and, by extension, of other contexts that contrast with it in various ways. On the other hand, it may inadvertently contribute to the perpetuation of discourses that reinforce categories such as ‘Western’ and

'non-Western' (and their associated attributes) rather than deconstructing them, as discussed in Chapter 1.4.6.

Other potential limitations of this research relate to the fact that much of my understanding of the Cuban context, as well as the discourse analytic approach and the related analysis of subjectification which plays a prominent role in this study, was acquired in the course of the research process. As is probably common for newcomers to a field, I was initially somewhat overwhelmed by the breadth of the discourse field of the Cuban realm of work. Consequently, I spent a certain amount of time familiarising myself with the discourse analytic perspective and the discourse field itself. Furthermore, I did most of the empirical work and analysis on my own (which was partly due to the pandemic, as mentioned earlier). As a result, due to time constraints, particularly compelling questions that emerged later in the research process could only be touched upon superficially. These include, for example, the similarities between the subjectification patterns analysed in this research and those observed in previously studied contexts, as mentioned in Article D, as well as the links between interviewees' specific interpretations and other situational or identity-constituting factors. For example, I would have liked to explore gender issues more fully in the interview data, as well as issues related to racialization or generational differences.

As concluded in the previous chapter, this research, composed of four different articles, contributes to the literature on (e)valuations in the realm of work by examining the Cuban case from different theoretical, methodological and empirical perspectives. However, the cumulative format of this dissertation also entails certain limitations. Each article focuses on a specific research question and must present a clear and convincing argument that relates to the thematic focus and research discussed in the respective journal. As a result, certain aspects of the research could not be addressed in as much depth as they might have been in a monograph-style dissertation. Furthermore, the overarching 'thread' of the research may be less apparent at certain points given the segmented nature of the article-based format.

Many of the limitations outlined in this chapter also point toward future research perspectives. Indeed, for the future study of the Cuban realm of work – and potentially beyond, whether in the Caribbean, other Latin American contexts, or even further afield where parallels can be drawn – it seems crucial to further address the transformations briefly discussed in Chapter 1.6, particularly the deepening crisis and the growing inequality within society. Contextual factors such as Trump's renewed presidency, the impacts of climate

change,[38] changing state policies, and technological transformations will need to be considered in future research on distributive justice, (e)valuations, and the subjectification of work. As indicated above, I consider it particularly important in this regard to examine the implications for specific structurally disadvantaged groups within society, such as women and Afro-descendants, including intersections between these groups, as well as their strategies of resistance (e.g., Almeida Junco and Guillard Limonta, 2020).

In conclusion, despite its limitations, this research provides insights into the (e)valuation of work, related principles and notions of justice, and modes of subjectification within the Cuban realm of work, offering points of connection and paving the way for future research both within Cuba and in comparative contexts.

[38] The consequences of climate change will hit the Caribbean region particularly hard, for example through the effects of natural disasters such as hurricanes on employment and unemployment (e.g., Mohan & Strobl, 2021), or rising sea levels, which will fundamentally alter living conditions, as well as economic and work patterns (see, for instance, the example of tourism in Spencer et al., 2022).

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5 Appendix

5.1 Items of the online survey (in Spanish)

Cuestionario "Trabajo e ingresos en Cuba"

Para empezar querríamos hacerle algunas preguntas sobre su nivel de satisfacción personal:

1. ¿Cuán satisfecho está usted con su(s) trabajo(s)?
2. ¿Cuán satisfecho está usted con su salario (vinculado al trabajo)?
3. ¿Cuán satisfecho está usted con sus ingresos (en general)?
4. ¿Cuán satisfecho está usted con su vida en general?
5. ¿Diría que su satisfacción en una o más de estas áreas ha cambiado desde el comienzo de la pandemia del coronavirus?

En lo siguiente encontrará diferentes ocupaciones. Por favor, ordénelas según lo que usted cree que se gana actualmente, y según lo que usted piensa que debería ganarse en estas ocupaciones en Cuba.

Mucha gente no está muy segura de cuánto se gana o debería ganarse en estos trabajos, pero por favor trate de estimar un PROMEDIO, teniendo en cuenta ingresos directos (p.ej. salario, estímulo, propinas, …) e ingresos indirectos (p.ej. uso de recursos / carro, sobra de materiales / comida, …)

6. Ordénelas según lo que usted cree que se gana actualmente en Cuba en estas ocupaciones:
7. Ordénelas según lo que usted piensa que debería ganarse en estas ocupaciones:
8. Es posible que antes de la pandemia del coronavirus algunas personas hubieran respondido de manera diferente a la pregunta anterior. ¿Cree usted que ha cambiado su opinón sobre lo que debería ganarse en diferentes profesiones y trabajos con la pandemia del coronavirus?

¿En qué medida está usted de acuerdo o en desacuerdo con las siguientes afirmaciones?

9. Las diferencias de ingresos en Cuba son demasiado grandes.
10. El Estado tiene la responsabilidad de reducir las diferencias de ingresos entre los que tienen ingresos altos y los que tienen ingresos bajos.
11. Toda persona debe recibir un ingreso básico, independientemente de lo que haga por la sociedad.
12. El gobierno debe poner un límite máximo a la cantidad de dinero que una persona puede ganar.
13. Hay un incentivo para el esfuerzo individual sólo si las diferencias de salario y de prestigio son suficientemente grandes.
14. La desigualdad en los ingresos es necesaria para la prosperidad de un país.
15. Los pobres podrían mejorar su vida si lo intentaran realmente.
16. El trabajar duro no suele traer éxito. Es más una cuestión de suerte y de conexiones.
17. El trabajo que se realiza en el hogar (tareas domésticas, cuidado de los niños, etc.) se valora en la sociedad Cubana.
18. La importancia del trabajo en nuestras vidas debería disminuir.

En su opinión, al decidir lo que la gente debería ganar,
¿qué importancia debería tener cada uno de los siguientes factores?
¿qué importancia tienen estos factores realmente para de determinar los niveles de salarios en la Cuba de hoy?

19. En la determinación del nivel del salario, la responsabilidad que va vinculada al trabajo debería ser un factor:
20. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, la responsabilidad que va vinculada al trabajo es realmente un factor:
21. En la determinación del nivel del salario, el número de años dedicado a educación y preparación debería ser un factor:

22. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, el número de años dedicado a educación y preparación es realmente un factor:
23. En la determinación del nivel del salario, lo que se necesita para mantener un nivel de vida mínimo debería ser un factor:
24. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, lo que se necesita para mantener un nivel de vida mínimo es realmente un factor:
25. En la determinación del nivel del salario, el hecho de que el trabajador tenga necesidades especiales, niños o familiares que necesitan atención particular debería ser un factor:
26. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, el hecho de que el trabajador tenga necesidades especiales, niños o familiares que necesitan atención particular es realmente un factor:
27. En la determinación del nivel del salario, el resultado colectivo del trabajo del equipo debería ser un factor:
28. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, el resultado colectivo del trabajo del equipo es realmente un factor:
29. En la determinación del nivel del salario, el resultado individual del trabajo de la persona debería ser un factor:
30. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, el resultado individual del trabajo de la persona es realmente un factor:
31. En la determinación del nivel del salario, la dureza del trabajo y condiciones de trabajo desagradables (sucios, ruidosos o agotadores,…) deberían ser un factor:
32. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, la dureza del trabajo y condiciones de trabajo desagradables (sucios, ruidosos o agotadores,…) son realmente un factor:
33. En la determinación del nivel del salario, el beneficio que tiene el trabajo para otras personas debería ser un factor:
34. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, el beneficio que tiene el trabajo para otras personas es realmente un factor:
35. En la determinación del nivel del salario, el beneficio que tiene el trabajo para la economía Cubana debería ser un factor:
36. ¿Cree usted que esto se corresponde con la realidad? En su opinión, para determinar el nivel del salario en la Cuba de hoy, el beneficio que tiene el trabajo para la economía Cubana es realmente un factor:
37. En algunos países, la gente con ingresos más altos puede pagar una asistencia médica mejor que la gente con ingresos más bajos.
    ¿Cree usted que esto es justo o injusto – que está bien o mal?
38. En algunos países, la gente con ingresos más altos puede pagar una educación mejor para sus hijos que la gente con ingresos más bajos.
    ¿Cree usted que esto es justo o injusto – que está bien o mal?

En Cuba, todas las personas tienen una libreta de abastecimiento, independientemente de sus ingresos y de su situación económica. ¿Qué opina usted sobre esto?

39. La libreta garantiza un nivel de vida mínimo para todas y todos.
40. La libreta evita que la gente haga esfuerzos individuales y asume la responsabilidad para proverse a sí misma.
41. Sería más justo si sólo se le diera una libreta a la gente que realmente la necesita.
42. Los recursos que se utilizan por la libreta podrían invertirse mejor en otro lugar.

43. Si usted piensa que los recursos que se utilizan por la libreta podrían invertirse mejor en otro lugar y tiene una idea concreta en mente, puede indicarla aquí:

Para terminar, nos gustaría pedirle algunas informaciones personales, le recalcamos que le aseguramos la total confidencialidad de esta información:

44. Sexo:
45. Edad en años cumplidos:
46. ¿En dónde vive usted actualmente?
47. Color de la piel:
48. ¿Tiene usted una creencia religiosa?
49. ¿Tiene usted una participación activa en una o varias organizaciónes sociales / politicas / de masas?
50. ¿Cual es su nivel educativo?
51. Profesión / Especialidad:
52. ¿Cual es su trabajo actual? Si tiene varias ocupaciones puede indicar hasta tres, empezando con su ocupación principal:
53. Es decir que trabaja en el sector / los sectores:
54. Si usted ha cambiado de puesto de trabajo en el pasado, ¿cuáles fueron sus trabajos anteriores? Por favor, indique los puestos de trabajo que ha tenido en su vida, y el sector económico correspondiente (véase la lista anterior).
55. ¿Nos podría decir lo que usted ganaba mensualmente con su(s) trabajo(s) antes de que empezó la pandemia del coronavirus?
56. ¿Esto ha cambiado desde que empezó la pandemia del coronavirus?
57. ¿Por último, quisiéramos preguntarle si usted estaría dispuesto a participar en una entrevista personal en el curso de este año?
    Si está de acuerdo, por favor indique su número de teléfono y/o su dirección de correo electrónico:
58. MUCHAS GRACIAS por su colaboración!
    Para llegar al mayor número posible de personas, nos ayudaría mucho si usted reenvía el link de este cuestionario y/o lo comparte en las redes sociales. También le agradeceríamos que rellenara el cuestionario con familiares que no tienen acceso a internet, un móvil o una computadora.
    Si tiene alguna pregunta sobre la encuesta o si quiere decirnos algo más, puede hacerlo aquí:

5.2 Corpus of documents ('policy' and discourse analysis)

The following sections present the 461 documents that make up the corpus. During the different stages of research and development of the respective articles, I had organised the documents according to different logics (and weighted them accordingly for the analysis). The focus here is on a simplified and comprehensible listing of the documents. For the sake of clarity, I have grouped them into broad categories (as reflected in the subheadings) and arranged them alphabetically or by date below. As some of the original access links no longer work, hyperlinks have been omitted to improve readability and maintain a clear overview.

5.2.1 Cuban print and online media and websites (state-dependent)

For the sake of simplicity and consistency, authors of articles in online and print media are not listed, but these and other contextual details of the documents were taken into account in the analysis. Depending on the medium/website and author, the classification of the documents into the categories 'state-dependent' and 'state-independent' was more or less clear.

The majority of documents originate from online media and websites. Articles from *Granma* and *Trabajadores* were mostly sourced from online archives, but some were sourced from physical newspapers. For this reason, unlike other media sources, these two are not referenced by their websites.

Title	Date	Medium
Declaración final del XIX Congreso de la CTC	2006/09/28	acn.cu
Nuevo sistema de pago por resultados	2008/06/11	Granma
Implementar el sistema de pago por resultados	2008/10/28	Granma
Amplían en Cuba trabajo por cuenta propia	2010/09/24	cubadebate.cu
Trabajo por cuenta propia. Mucho más que una altenativa	2010/09/24	Granma
Opinion por cuenta propia	2010/11/18	Granma
Cuba eliminará gradualmente libreta de abastecimiento	2010/12/17	cubadebate.cu
Nota informativa sobre el trabajo por cuenta propia	2013/11/02	Granma
Expectativas por cuenta propia	2014/01/31	Granma
Aprobó Consejo de Ministros incremento salarial para el sector de la Salud	2014/03/21	Granma
El Che Guevara, el trabajo y el papel de los trabajadores	2014/04/30	radiorebelde.cu
Empresarios para estos tiempos	2014/07/08	cubadebate.cu
¿Borrón y salario nuevo?	2014/07/27	Trabajadores
Salario o productividad, como la gallina y el huevo	2014/09/25	Granma
Entrevista sobre el Código de Trabajo en Cuba	2014/11/24	Trabajadores
¿Mensajeros por su cuenta?	2015/06/06	escambray.cu
Resolución 17: de la letra a la empresa	2015/07/02	Granma
Equidad, igualdad e igualitarismo	2015/08/21	cubadebate.cu
A cuenta y riesgo, no por cuenta propia	2015/09/24	Granma
Se buscan socios	2015/12/15	juventudrebelde.cu

Los cuentrapropistas muestran credenciales	2016/01/17	Trabajadores
Crece y valida su importancia el trabajo por cuenta propia en La Habana	2016/01/20	Granma
Publica la Gaceta Oficial modificaciones al sistema de pago por rendimiento	2016/03/23	cubadebate.cu
Obama y la economía cubana: Entender lo que no se dijo	2016/03/23	cubadebate.cu
El salario que tanto necesitamos (I) Algunas definiciones	2016/04/24	Trabajadores
Mundo patasparriba y pirámide invertida	2016/05/27	cubaahora.cu
¿La Resolución No. 6 será la gallina de los huevos de oro?	2016/05/31	cubadebate.cu
Agentes postales: ¿carteros por cuenta propia?	2016/06/09	Granma
Ser revolucionario en Cuba, hoy	2016/09/20	Granma
Cuba y la emigración: El duro vuelo de las golondrinas	2016/09/26	cubadebate.cu
Para salir del callejón salarial	2016/10/27	Granma
Más producción para igual salario	2017/01/15	Trabajadores
Héroes y Heroínas del Trabajo de la República de Cuba	2017/01/27	Trabajadores
Empresa Estatal Socialista: de la Resolución 17 a la 6 (Parte I)	2017/01/29	cubadebate.cu
Empresa Estatal Socialista: Autonomía, productividad, salarios... (Parte II)	2017/01/31	cubadebate.cu
Empresa Estatal Socialista: La opinión de los lectores (Parte III)	2017/02/07	cubadebate.cu
Empresa Estatal Socialista: ¿En qué se ha avanzado y qué falta? (Parte IV)	2017/02/10	cubadebate.cu
Revendedores, un negocio lucrativo que hay que detener	2017/03/22	cubaperiodistas.cu
Revendedores: Otra pandemia del actual siglo	2017/05/03	cubasi.cu
Díaz-Canel recorrió obras económicas y sociales en Santiago de Cuba	2017/05/12	radiohc.cu
El sindicato, apoyo para el trabajador cuentapropista	2017/05/23	Granma
Jóvenes cubanos, protagonistas de la batalla por el desarrollo económico y social del país	2017/06/11	Granma
Que la eficiencia siempre agregue el valor	2017/06/15	Granma
A debate en el Parlamento fluctuación laboral del potencial científico en Cuba	2017/07/12	cubadebate.cu
El salario y la matemática compleja	2017/07/18	cubaahora.cu
Trabajo por cuenta propia. Por la ruta de la actualización.	2017/08/01	Granma
Revendedores, persistencia dañina	2017/08/03	Granma
Che, el trabajo y el hombre en la construcción del socialismo	2017/08/08	Trabajadores
Anerkennung der Leistung der Frauen	2017/08/18	cubadebate.cu (Deutsch)
Cuba en 1962: Una trinchera más para defender la Revolución	2017/11/04	fidelcastro.cu
Pinar del Río: Sancionan a revendedores y acaparadores de materiales de construcción	2017/12/25	cubadebate.cu
Los trabajadores en la batalla económica	2018/03/09	Trabajadores
Un antes y un después de la Seguridad Social en Cuba	2018/06/14	Granma
Los frutos de la indolencia: Cimex revela detalles del acaparamiento en La Puntilla y su investigación	2018/09/11	Granma
Conferencia de la CTC en Santiago de Cuba: A debate el salario como mayor problema de los trabajadores	2018/10/22	Granma
“ConCiencia”: Opiniones polarizadas, ¡cómo debe ser!	2018/11/28	cubadebate.cu
Presidente cubano: La tarea principal continúa siendo la batalla económica	2018/11/30	cubadebate.cu (Mesaredonda)
Trabajo por cuenta propia: ¿De dónde viene y a dónde va?	2018/12/07	cubaahora.cu
La batalla económica, prioridad de la Federación de Mujeres Cubanas	2018/12/17	venceremos.cu
La batalla económica, una prioridad para Cuba	2019/03/13	Granma
La batalla económica, una prioridad para Cuba	2019/03/14	mep.gob.cu
Principales inquietudes de los trabajadores cubanos, en datos	2019/04/17	cuba.cu
Empleo, salario y pensiones en la mira del congreso sindical cubano	2019/04/20	cubadebate.cu
Retos de la clase obrera cubana: más producción y mejores servicios.	2019/04/24	misiones.cubaminrex.cu
¿A cada cual según su capacidad?	2019/05/21	periodiodico26.cu
Díaz-Canel: “Necesitamos respuestas ágiles y eficientes”	2019/06/07	Granma
Anuncia Presidente cubano medidas económicas e incremento salarial en el sector presupuestado	2019/06/27	Granma

La batalla económica exige inteligencia asegura presidente cubano	2019/06/28	prensa-latina.cu
Díaz-Canel: intentamos mejorar la pirámide salarial en Cuba	2019/06/28	cadenagramonte.cu
Díaz-Canel: La suma de todos los esfuerzos hará el milagro de la prosperidad sostenible a la que no hemos renunciado	2019/07/02	cubadebate.cu (Mesaredonda)
Un primer paso para invertir la pirámide salarial	2019/07/03	Granma
La escuela en lo más alto	2019/08/24	cubadebate.cu
José Luis Rodríguez: "Para Fidel no había economía sin política ni política sin economía"	2019/09/03	cubaperiodistas.cu
Destaca Díaz-Canel papel de la ANEC en la batalla económica de Cuba	2019/12/16	presidencia.gob.cu
Desmiente Ministro de Economía cubano manipulaciones sobre un cambio monetario inminente	2019/12/24	Granma
Aplicación informática de la UCI promete poner coto a los acaparadores	2020/04/04	Trabajadores
Acaparadores trasquilados	2020/06/04	Trabajadores
Control popular a los coleros, revendedores y acaparadores	2020/08/02	Trabajadores
Cuba en datos: De bolsillos y billeteras, hablemos del salario	2020/09/04	cubadebate.cu
Re-formar el salario en Cuba: Pirámides, canastas y la necesidad de trabajar	2020/10/26	Trabajadores
Unificación monetaria: revertir la pirámide invertida en el ámbito labora	2020/11/09	Granma
Revertir la pirámide invertida	2020/11/10	Trabajadores
Lo que debe saber sobre los nuevos salarios, tributos, pensiones y prestaciones de la seguridad social	2020/12/12	cubadebate.cu
¿Cómo Cuba aplicará la reforma del salario?	2020/12/12	Granma
Tarea Ordenamiento en Cuba: salarios, subsidios y seguridad social	2020/12/12	ahora.cu
Reordenar la piramide salarial : luces des una reforma	2020/12/23	Granma
Pirámide nueva, vida nueva	2020/12/25	cubahora.cu
Nuevas medidas de carácter salarial aprobadas como parte de la Tarea Ordenamiento	2021/02/17	cubadebate.cu
Perfeccionamiento del trabajo por cuenta propia: Elementos que debes conocer	2021/02/19	cubadebate.cu
Homenaje a quienes tanto han dado	2021/04/03	cubadebate.cu
Un año en "stand by" o los números rojos del sector no estatal dependiente del turismo	2021/04/07	cubadebate.cu
La cultura de innovación y los empresarios: Iniciativa, emprendimiento y éxito	2021/04/09	cubadebate.cu
Pruebas de aptitud: Donde se miran lo real y lo subjetivo	2021/05/17	cubadebate.cu

5.2.2 Cuban and foreign print and online media and websites (state-independent)

Title	Date	Medium
Cuba: adiós a la igualdad en los salarios	2008/06/12	portafolio.co
Cuba pagará salarios por productividad y sin topes	2008/06/12	ambito.com
Cuba: La Revolución ya no puede atender ciertas demandas sociales que no pudo resolver	2009/10/17	urgente24.com
Gehaltvoller Sozialismus. Kuba schwenkt zum Leistungsprinzip	2010/05/17	süddeutsche.de
¿A dónde va Cuba? ¿Hacia el capitalismo o el socialismo?	2010/10/04	marxist.com
Enrique Ubieta: "Las Damas de Blanco son un montaje escenográfico"	2010/10/27	jovencuba.com
Pirámide Invertida	2010/12/12	havanatimesenespanol.org
Las reformas económicas y los presos políticos, protagonistas del 2010 cubano	2010/12/16	elmundo.es
En #Cuba, la pirámide social está invertida	2011/01/22	joanantoniguerrero.wordpress.com
En Cuba, la pirámide social está invertida	2011/01/26	taniaquintero.blogspot.com
Cuba quiere revolucionar su sistema educativo	2011/03/21	bbc.com
La "batalla económica" de Raúl Castro	2011/04/13	finanzas.com
La pirámide invertida… Cuba y Puerto Rico	2011/04/30	trastalleres.blogspot.com
Cuba: la isla de lo real maravilloso	2011/06/08	jovencuba.com
Raúl Castro cumple cinco años al frente del gobierno de Cuba	2011/07/31	rtve.es
Las manzanas de la discordia	2011/12/12	cubanet.org
Plusvalía y salario en Cuba	2012/01/09	ajudicuba.wordpress.com

Who do Cuba's unions defend?	2012/05/15	socialistworker.org
El salario en Cuba en 2011	2012/06/19	cubaencuentro.com
No estamos tan iguales como nos dice Raúl Castro	2012/10/04	cubanet.org
Opinión sobre la actualización de la política migratoria cubana	2012/11/12	mx.boell.org
Grupos e identidades en la estructura social en Cuba	2012/12/01	sociologiacritica.es
La insuficiencia del salario y los ingresos en Cuba	2013/01/06	oncubanews.com
La libreta de racionamiento cumple más de medio siglo en Cuba	2013/07/10	cubanet.org
Pirámides en Cuba, pirámides de Egipto	2013/07/15	havanatimesenespanol.org
Cómo el "cuentapropismo" está cambiando Cuba	2013/07/29	bbc.com
La Pirámide continuará invertida	2013/08/15	martinoticias.com
Das neue kubanische Wirtschaftsmodell – der Plan für 2014	2013/10/17	cubaheute.de
Kubanischer Gewerkschaftsverband hält Kongress ab	2014/02/26	cubaheute.de
Cuba incrementará los salarios del sector médico	2014/03/21	elmundo.es
Aconseja Raúl Castro "gradualidad" en la institucionalización del país	2014/03/31	sinembargo.mx
Revendedores de papel higiénico	2014/04/14	cubanet.org
Instituto de organización del trabajo y los salarios	2014/04/17	memoriascubano. blogspot.com
¿Cómo sobrevivir en Cuba con 18 dólares al mes?	2014/04/30	cubanet.org
Vendedores de tercera y cuarta mano	2014/06/01	oncubanews.com
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Aplicación del sistema de pago por resultados en Cuba	2014/09/12	gestiopolis.com
Adiós a la doble moneda: Cuba se prepara para el "día cero"	2014/10/12	diariolasamericas.com
Fuerza de trabajo calificada en Cuba	2014/10/29	jovencuba.com
Los Derechos Laborales en Cuba Frente a la Ley de Inversión Extranjera	2014/11/30	ascecuba.org
Cuba: Reformas a la zaga de cambios sociales	2014/12/28	sinpermiso.info
¿Aumentar salario en Cuba pagando el mismo sueldo?	2015/01/10	cubainformacion.tv
Cuba, la hora del deshielo	2015/01/30	elperiodico.com
Cuba: las desigualdades se tornan visibles. Consecuencias de la economía de escasez y reformas	2015/02/25	nuso.org
Cuanto y como trabajan las mujeres en Cuba?	2015/05/22	oncubanews.com
Quién endereza la pirámide invertida cubana?	2015/10/08	havanatimesenespanol.org
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In Cuba, there is nothing permanent except change	2016/01/12	brookings.edu
Cuba, las pirámides y el capital humano	2016/01/21	uprrp.edu
El estatus social está en el 'cake'	2016/01/23	14ymedio.com
Robar en Cuba significa "compensar el salario"	2016/02/02	cubanet.org
Cuba: "De nada vale rebajar unos centavos si no suben los salarios"	2016/04/26	martinoticias.com
Cuba, profesionales atrapados en "la pirámide invertida"	2016/06/08	cibercuba.com
Wie viel verdienen die Kubaner wirklich? – Auf den Spuren des Realeinkommens der sozialistischen Insel	2016/07/17	cubaheute.de
"El trabajo es remunerado conforme a su calidad y cantidad"	2016/10/10	ajudicuba.wordpress.com
Conversar con los jóvenes	2016/11/02	jovencuba.com
El igualitarismo es injusto	2016/11/28	14ymedio.com
¿Quién paga la salud y la educación en Cuba?	2017/03/30	periodicocubano.com
Desigualdad en Cuba: ¿combatiendo la riqueza o la pobreza?	2017/05/03	nodal.am
¿Reciben los cubanos un salario de 25 dólares al mes?	2017/05/04	alainet.org
Cuba's Foreign Sector: Data for 2015 are (finally) available	2017/05/12	ascecuba.org
'Temas' y la desigualdad económica en Cuba	2017/06/29	diariodecuba.com
Alarma por éxodo de científicos en Cuba llega al Parlamento	2017/07/12	martinoticias.com
A trabajo igual salario igual	2017/07/13	elestadocomotal.com
Salarios en Cuba son una broma: "la gente hace como que trabaja y el gobierno, como que paga"	2017/07/15	martinoticias.com

Why Cuba's brain drain looks completely different	2017/08/05	rhsmith.umd.edu
La pirámide invertida	2017/10/16	jovencuba.com
Castro urge a eliminar doble moneda y anticipa otro año difícil para la eeconomía	2017/12/22	www.larepublica.ec
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Salmo al salario	2018/02/08	jovencuba.com
Largas colas en los bancos cubanos ante el temor del fin de la doble moneda	2018/03/16	diariodecuba.com
Los derechos humanos y el trabajo en Cuba	2018/03/21	derechoseconomicos.com
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Cuba: El Obrero de Ayer Ganaba 40 Veces Más que su Nieto de Hoy	2018/05/15	contactomagazine.com
El exilio interno	2018/06/07	jovencuba.com
La Pirámide Invertida y la Economía Moral	2018/06/18	rebelion.org
Trabajo, salario y reforma de la Constitución cubana	2018/07/09	elestadocomotal.com
La reforma salarial de 1980	2018/07/10	cubaylaeconomia.com
The average Cuban worker's grandfather earned 40 times more than his grandson	2018/07/12	diariodecuba.com
Los hijos bastardos de la Revolución	2018/07/17	jovencuba.com
A new 'Economic Reform Czar' in Cuba?	2018/07/25	diariodecuba.com
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Búsqueda y captura de las 'jabitas' de nylon	2018/09/20	14ymedio.com
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El Gobierno dice que trabaja en una reforma salarial, pero 'condicionada'	2018/10/13	diariodecuba.com
Líder de la CTC convoca a los cubanos a "luchar" por el aumento del salario	2018/10/22	cibercuba.com
Bajos salarios, la mayor preocupación laboral en Cuba	2018/10/23	oncubanews.com
Ruta crítica del sindicalismo cubano actual: hacia una nueva CTC	2018/10/24	medium.com
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Kubas Nationalversammlung zieht Bilanz: Entwicklung der Wirtschaft als Hauptaufgabe	2018/12/26	cubaheute.de
La "batalla económica" de la Revolución Cubana: adaptarse o perecer	2018/12/28	larepublica.ec
La batalla económica de la revolución cubana	2019/01/02	laestrella.com
Raúl Castro urge a resolver los problemas económicos y a captar la inversión foránea	2019/01/02	efe.com
Gewerkschaftskongress diskutiert anstehende Reformen und fordert „Einheit der Arbeiterklasse"	2019/04/23	cubaheute.de
The Cuban Economy 60 Years later	2019/06/10	ascecuba.org
Cuba aumenta el salario mínimo mensual a 16 dólares y anuncia medidas para enfrentar la crisis económica	2019/06/28	elnuevoherald.com
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Subirán los salarios en Cuba a los "operarios de alta calificación"	2021/02/18	periodicocubano.com
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5.2.5 Speeches and writings by political leaders

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The Cuban revolution of 1959 – legitimating an ongoing revolutionary process

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Introduction

On 1 January 2018, the Republic of Cuba officially celebrated the 59th anniversary of the *triumph of the revolution* – an expression commonly used to describe the takeover of the rebels under the leadership of Fidel Castro in 1959 – and entered *year sixty of the revolution*. The "remarkable endurance of the Cuban revolution" (Kapcia 2008: 7), or at least the perception and representation of an enduring revolution, is certainly one of its peculiarities. Indeed, within the Cuban context, the term *revolution* is often used to describe an "ongoing state political project – event, structure, and process" (Gropas 2007: 533). A project which is, up until today, under construction. Conceptually speaking, one may question whether it is even possible that a revolution may last for more than five decades. Actually, no overall definition of *revolution* exists. The term is contested, and claimed by different strands and movements (Grosser 2013: 22). Since revolution can be considered as a category of self-interpretation of those who are involved in it (Endruweit, Trommsdorff and Burzan 2014: 408), and since incompleteness and open-endedness are inherent to the concepts of revolution and revolutionary change (Grosser 2013: 21; Scott and Marshall 2014: 633), conceptual arguments for the perception of an ongoing Cuban revolution can be provided.

When engaging with the idea of an ongoing revolutionary process, one can ask how this ongoing process of the Cuban revolution has been constructed and justified over time. While "the weight and oppressiveness of the Cuban state" (Farber 2011: 37), the repression and the eliminating of opponents and dissidents have played an important role, there has always been popular support for the revolution – or at least for parts of it. Where did and does this support come from – in other words, what has given legitimacy to the lasting project of the Cuban revolution? In the following, some elements of the historiography of the Cuban revolution of 1959 and its emphasis on so-called revolutionary moral and values will be presented as two important legitimating components of this revolution. To do so, we will, in a first step, give a brief overview of the historical context of the Cuban island before 1959. In a second step, the triumph of the revolution and the building of a revolutionary society will be examined, with a focus on the construction of a *revolutionary continuum* that links certain parts of Cuban history to the revolution of the 20th century. In a third step, we will look at the role of a set of

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social values, which have often been linked to the Cuban revolution by its supporters throughout different phases of the revolution. We will conclude with a short summary of the societal and economic developments during and after the *special period* – an expression used to describe the economic depression Cuba fell in after the collapse of the Soviet Union.

The prelude of the Cuban revolution of 1959

As noted above, the beginning of the Cuban revolution is most commonly dated to 1 January 1959. However, the historiography of the revolution embeds it into a larger context, notably that of former struggles for Cuban independence. The following summary of this context – or rather, of ex-post representations of this context – is by no means exhaustive and does not claim to be unmitigated. It deliberately focuses on the above-named topics, so as to enable a better understanding of the link between history, social values and the legitimation of an ongoing Cuban revolution.

Cuba had been under Spanish colonial rule for three and a half centuries (Spanish conquistador Diego Velázquez had arrived on the island in 1510) when the first calls for independence emerged in the second half of the 19th century. The first independence war (1868 - 1878), which was closely linked to anti-slavery movements, was lost against the colonial rulers. Despite the defeat, the war appeared to help the building of a *Cuban identity* among the people by uniting a population of different heritages and ranks (black and white people, slaves, plantation and landowners) against a common enemy (Hoffmann 2009: 33).[2] Fostered by this new national consciousness, the strive for independence continued. Under the leadership of intellectual and writer José Martí (until his early death on the battlefields in 1895), as well as the military chiefs Antonio Maceo and Máximo Gómez, independence from Spain was finally achieved in 1898. The triumph, however, was short-lived: the end of Spanish colonial rule proved to be the beginning of US dominance over the country. The United States had both economic and geopolitical interests in the Cuban island, as it constitutes a key point of access to the Gulf of Mexico (Hoffmann 2009: 14). The US army entered the Cuban independence war – which then became the *Spanish-American war*[3] – in its final stage in 1898 and occupied the island from 1898 to 1902. Cuban representatives were excluded during the peace negotiations between Spain and the United States, which strengthened Cuban people's perception that their role in this war had been neglected (Hoffmann 2009; Wehrli 2009; Hartmann 2017). In 1902, the era of the so-called *República Plattista* began. The expression alludes to the Platt Amendment, a treaty containing several conditions set by Washington, which were amended to the constitution of the newly proclaimed *Republic of Cuba*. By means of this amendment, the United States ensured itself, among other things,[4] "the right to intervene for the preserva-

[2] During Spanish colonial rule, black slaves (mostly from present day Angola, Congo, and Nigeria) were – legally and illegally – brought to the island (Wehrli 2009: 56). Since then, blacks and mulattos have constituted an important part of the Cuban population (Wehrli 2009: 56-58). A detailed description of the ethnic and racial composition of the Cuban people is provided by Gott (2004: 5-10).

[3] For further explanations on this war see, for example, Gott (2004).

[4] Incidentally, the US naval base near Guantanamo bay is a heritage of the Platt Amendment. In the first place, the agreement over the base was made for 99 years, but was later extended for an indefinite period of time (Hartmann 2017).

tion of Cuban independence, the maintenance of a government adequate for the protection of life, property, and individual liberty" (quoted after Gott 2004: 327).

The *Plattist Republic* officially ended in 1934, when the Platt Amendment was terminated. Unofficially, however, Cuba remained under guardianship of the United States until the end of the 1950s: "US control of Cuba necessarily became less direct and obvious, and was now largely exercised through economic hegemony only" (Kapcia 2008: 19). With regard to internal developments, the first half of the century was characterised by political instability. The military dictatorship of "tropical Mussolini" (Gott 2004: 129) Gerardo Machado (1925-1933), the failed attempts of reform under president Ramón Grau San Martín (1933-1934; 1944-1948), and several other (ephemeral) governments defined the political landscape of what historians of the 1959 revolution later called the "pseudo-republic" (Miller 2003: 151; Gott 2004: 113). A man who exerted substantial influence on the politics of this era was Fulgencio Batista, acting president from 1940 to 1944 and – after his temporary retreat to the United states – again from 1952 until 1958, following his *coup d'état* in 1952. Batista temporarily managed to stabilize the political system and enjoyed popular support owing to his progressive reform attempts (anchored in the constitution of 1940) and his strategic political alliances (Kapcia 2008: 17-19; Hoffmann 2009: 51). Cuba's economic situation was – at least temporarily – considered as relatively good among Latin American countries (Kapcia 2008: 7; Hartmann 2017: 397). This was partly due to sugar production, which had almost completely dominated the Cuban economy since the 17th century, and which was boosted when European and Asian sugar production collapsed during the world wars (Gott 2004: 144). Nonetheless, social inequality and poverty were far from being abolished; corruption, nepotism, and violence seemed to prevail under all of the numerous presidents that officially governed the island in the first half of the 20th century. As Krull and Kobayashi (2009: 164) describe, before 1959, "Cuba was known as the 'Bordello of the Caribbean' because its thriving tourist industry depended on prostitution, Mafia-run casinos, and a prosperous drug trade." This was particularly the case for the country's capital, Havana.

The growing dissatisfaction with the Batista regime enforced popular support for political opponents, among whom were the young lawyer Fidel Castro and his combatants. After their failed attack on the Moncada Barracks in Santiago de Cuba, Cuba's second largest military garrison at that time, on 26 July 1953,[5] Fidel, his younger brother Raúl Castro, and the other survivors of the attack were imprisoned for two years. At their release in 1955, they went into Mexican exile, where they were joined by the Argentinian doctor Ernesto *Che* Guevara. The *26th of July movement*, as the rebels called themselves now, arrived in 1956 on the motor yacht *Granma* in the province of Oriente, where Batista troops attacked them. The survivors started a guerrilla battle in the east of Cuba. This time, with the growing support of the rural population, the rebellion was successful: when the guerrilla movement arrived in Havana on 1 January 1959, Batista fled the country and made way for the revolutionary government.

The history of colonial dependence from Spain, and even more the neo-colonial dependence from the United States, has played an important role for the popular support and the legitimation of the Cuban revolution over time. Up until today, Cuban narratives connect the

[5] For a detailed description of this event see, for example, Waters and Fernandez (2012).

rebel's victory in 1959 to liberation, national sovereignty, the assertion of social values, and the hope to build a more equal society. In the following, we want to take a closer look at this connection.

Historiography: The beginning of the revolution – constructing a revolutionary continuum

Political revolutions rely on "order creating visions" that enforce the distance to the old order of society, and out of which emerge "symbolic legitimations of the new order" (Endruweit et al. 2014: 409, my translation) of the revolution. As often argued (e.g. Perez 1980, 1985; Gewecke 1990; Miller 2003; Gropas 2007; Waters and Fernandez 2012), historiography provides an important symbolic legitimation for the Cuban revolution of 1959. In Perez' (1980: 88) view, the construction of a "historical continuum" that links the past with the revolutionary present, has helped to create national solidarity and support for this revolution over time.

The historiography of the revolution of 1959 is mainly characterised by the heroes of the independence wars from Spanish colonial rule, of whom José Martí is probably the most important. Martí, considered as "the grandfather" (Gropas 2007: 541), "the apostle" or "the prophet" (e.g. Castro 2007: 44; Gewecke 1990: 77; Waters and Fernandez 2012: 129) of the revolution, stands for Cuban independence, anti-(US)-imperialism, pan-Americanism, and social justice (Hoffmann 2009: 34-35). Martí is still omnipresent in contemporary Cuba. His image is perpetuated in statues, murals and banknotes; his quotes and poems can be found in the 'mnemonic landscape' (Gropas 2007) all over the country, and his writings are an important element of school education (Wehrli 2009: 60). January 28th, Martí's birthday, is one of the Cuban national commemoration days. Other heroes and myths of the 19th century independence wars, such as Carlos Manuel de Céspedes, Antonio Maceo, Máximo Gómez, and the image of the *mambí*[6] as „archetype of the Cuban rebel" (Wehrli 2009: 61, my translation) have also helped to legitimate and enforce the revolutionary project. In his famous defence *La historía me absolverá*, which he made in court after the attack on the Moncada Barracks, Fidel Castro (2007) linked these national heroes and myths to the causes of the rebellion. According to Wehrli (2009: 65, my translation), this speech allowed Castro to "position himself [within the national discourse]" and within "the genealogy of important characters". Miller (2003: 147) identifies the centrality of this defence of the revolutionary project history as "the key legitimating force behind the Cuban revolution."

After the triumph of the revolution in 1959, connecting the present to the struggles and heroes of the past continued to be an important pillar of revolutionary rhetoric. An early example of this is given by the celebration of *cien años de lucha* (hundred years of struggle) in 1968. The label of *cien años de lucha* – alluding to the beginning of the first independence war in 1868 – has been used as a theme for books, songs and stamps. An illustration of its official interpretation by the revolutionaries is provided by Fidel Castro's (1968) commemoration speech in Manzanillo in 1968, in which he depicts the commencements of the revolution in

[6] Presumably because of its 'African sound' (Hoffmann 2009: 38), the term *mambí* was originally used by the Spanish *conquistadores* as a derogatory designation for black rebels, first in the Dominican and then in the Cuban independence war (Gott 2004: 73). The warriors of the latter adopted this term, which was from then on used to denominate Cuban (guerilla) rebels fighting for the cause of independence.

October 1868, when Carlos Manuel de Céspedes declared the independence of Cuba, and the *mambises* started the independence war. As described by Perez (1980: 86), with *cien años de lucha*, "[t]he themes of struggle and the continuity of the revolutionary process became fused […] in a unifying historical construct".

In the first years of the revolution, the old order of Cuban society was overthrown completely. Soon after the revolutionary takeover, companies were nationalised, large landowners were expropriated and income was redistributed (Wehrli 2009: 67). The puritan Manuel Urrutia, who was appointed president from January to July 1959 (when Fidel Castro forced him to resign, Farber 2011: 13) made it his business to mark "a sharp break with Cuba's immediate past: brothels, gambling dens and the national lottery were to be closed down" (Gott 2004: 170). Revolutionary tribunals were established, in which actors and supporters of the Batista regime were sentenced to prison or death (Farber 2011: 35), without recourse to "formal procedures of a legal defence" (Miller 2003: 48). Many Cubans emigrated (mostly to the United States); an above-average number of them belonging to the white upper class of society (Wehrli 2009: 67). In 1961, Fidel Castro officially declared that the Cuban revolution was a socialist revolution (Kapcia 2008: 31).[7] The societal, political, and economic shifts of this era were in line with the Soviet model of socialism: the whole economy was nationalised and a one-party government, exercising control over many aspects in public and private spheres, was established (Farber 2011: 2). However, "the Cuban version [of Soviet socialism] had its own national characteristics, as was also the case with China and Vietnam" (Farber 2011: 2), which is sometimes referred to as "tropical socialism" (e.g. Burchardt 1998; Hoffmann 2009; Wehrli 2009). The Cuban revolutionaries had not been formed within the Soviet regime, and were first and foremost characterised by their nationalist orientation (Gott 2004: 148-149, Hartmann 2017: 400). Yet, Fidel Castro successfully managed to connect the topics of socialism and Cuban nationalism, which, according to Gott, was "one of the keys to his political longevity" (Gott 2004: 149). One of the most important slogans of the revolutionary rhetoric, *patria o muerte* (fatherland or death), whose origins are said to be in the independence claims of 1868 (Hoffmann 2009: 87), was occasionally converted by Fidel Castro into *socialismo o muerte* (socialism or death). Fidel Castro's personality and rhetoric have played a distinct role for the course of the Cuban revolution, which cannot be treated in full length in this article. Yet, his importance for the historiography of the revolution is to be noted in this context. As indicated by the title attributed to him after his retirement, the *historical leader of the Cuban revolution* has, over the years, known how to keep his position within the genealogy of national heroes and to become the "superior appeal body, […] the actual founder of the 'new era', who is identical with the revolution and its beginnings" (Gewecke 1990: 79, my translation).

[7] The discussion of whether the Cuban revolution was socialist in its roots, and which role was played by the interests and the opportunism of the revolutionary leaders, the United States and the Soviet Union is beyond the scope of this article. The interested reader is referred to Farber (2006); Kapcia (2008); Gott (2004).

The continuation of the revolution: Myths, revolutionary values and morality

As described above, the Cuban revolution is often represented as the continuance of past struggles of national independence and social justice. From this perspective, the triumph of the revolution in 1959 is perceived as the hard-won fruit of past efforts made for a free and equal Cuban society. Out of this "intertwining of history and the Revolution" (Gropas 2007: 536), another important element that has served to consolidate the legitimation of the (continuing) revolution arises, namely the appeal on the moral duty of present generations to defend and to pursue the values and the achievements of this revolution. As mentioned before, revolutionary rhetoric links the heroes of the 19th century, but also and especially those of the 20th century – Fidel Castro and Che Guevara, as well as a whole generation of revolutionaries who helped to build the new order of society – to values such as social justice and equality, morality, voluntary work and social property.

In Gewecke's (1990) view, *myths of success* and *myths of defence*[8] are important for the course of the Cuban revolution and its legitimacy within the Cuban population. In her opinion, both types of myth provide motivation, "specifically as an appeal to identify with the revolution by means of its achievements and – also in the sense of 'compensation myths' – to readily accept sacrifices and shortcomings" (Gewecke 1990: 80-81, my translation). What could be described as a Cuban myth of defence has in part been explained in the previous section, namely the threat of external invasion associated with Cuba's history of colonial and neo-colonial dependence. According to Gropas (2007: 535)

> *[t]he defence of la patria from external aggression (in its multitude and varied forms) is thus translated into an almost sacred historical 'obligation' to the Cubans who, throughout the nation's history, have died in defence of la patria's freedom. This historical point is felt even by the Revolution's fiercest Cuban critics living on the island.*

Moreover, myths of defence may provide legitimation for an enforced state control and an appeal to vigilance among the population (Gewecke 1990: 80), legitimating institutions such as the *Comités de Defensa de la Revolución* (neighbourhood committees in defence of the revolution). Originally created in order to identify potential collaborators of an expected US invasion in September 1960 (Kapcia 2008: 67), these committees have ever since played an important role in the surveillance and the overall organisation of the society (Wehrli 2009: 75-78). The relationship between Cuba and the United States – which have their own myths and emotionally charged rhetoric when it comes to Cuba – is a complex and controversial topic that cannot be extensively addressed here. Yet, we can state that this relationship has influenced the course of the Cuban revolution, also regarding its emphasis on values and morality. The closing down of brothels and casinos as one of the first acts of the revolutionary government may be interpreted as an illustration of the message this new government wanted to

[8] According to Gewecke's (1990: 74-75) definition, in this context, the term myth does not describe fictional, untruthful, or irrational relations. It is rather to be understood as a rationale to represent contexts as absolute truths.

send out from the start, notably "that the nation no longer prepared to play the prostitute to the desires of US imperialists and their local lackeys" (Miller 2003: 147).

Regarding the myths of success of the Cuban revolution, we can draw on what is often referred to as the *achievements of the revolution*, most notably the Cuban educational- and health care systems (Hoffmann 2009; Wehrli 2009, Farber 2011). The starting point of the former may be located in the literacy campaign in 1961, during which more than 700,000 adults were alphabetised by around 250,000 volunteers in less than a year (Gewecke 1990: 80). Especially for the approximately 100,000 young *brigadista* volunteers among them, the campaign had as much of a life-changing impact as on the alphabetised population (Kapcia 2008: 47). Organised in a military style, the campaign permitted these teenagers, who had not taken part in the *guerrilla* war of the 1950s, to consider themselves as revolutionaries, exercising an important role within the beginning phase of the revolutionary process (Gott 2004: 189, Kapcia 2008: 47-48). In Miller's view (2003: 150), the campaign was a "major vehicle for inculcating a sense of history" in this first phase of the revolution. According to Kapcia (2008: 47), "[d]esigned with political as much as social objectives – to integrate the neglected rural population into the new political process – it was one of the Revolution's most ambitious and most successful reforms." The campaign is often perceived as the prime example of the societal efforts made by the *revolutionary generation* following the role model of Che Guevara's (1987) ideal of a *new man*, who works selflessly for the common good. Along with other campaigns and projects based on voluntary labour (see, for example Kapcia 2008: 66), as well as the social and economic improvements during the first two decades of the revolution (such as significantly reducing malnutrition, unemployment and massive poverty, Burchardt 1998: 25; or advances in gender equality and the overall situation of many Cuban women, Krull and Kobayashi 2009: 165), this campaign has ever since played an important role for the legitimation of the (ongoing) Cuban revolution.

(How) does the Cuban revolution survive?

The island's economy slowed during the 1980s and – with the end of the Soviet Union, Cuba's most important trading partner at that time – fell into a deep economic crisis in the early 1990s, which was worsened by an enforced US-embargo (by means of the Torricelli law in 1992 and the Helms-Burton-law in 1996). The crisis was characterised by economic scarcity, inflation, stagnating wages, unemployment, and growing activities on the black market. In 1990, Fidel Castro proclaimed *the special period in times of peace*, "an emergency-war economy to withstand the coming collapse" (Kapcia 2008: 43). The US-Dollar was legalised again in the country, foreign investment and self-employment were partly reintroduced. The growing tourist sector, informal and illegal activities, as well as remittances (mostly from Cuban expatriates in the United States) helped many Cubans to make ends meet, but also contributed to growing inequalities within society. It is often asked how the revolutionary government and its leaders could survive the collapse of the Soviet Union and the severe economic depression that followed for the Cuban island. Given the range of factors in play, there is no single answer to this question. The easing of economic restrictions, as well as the – officially permitted – mass exodus of about 35,000 to 40,000 Cubans (also known as the *balsero-crisis*) following the

habanazo, a massive protest in Havana in August 1994, have certainly contributed to its survival (Wehrli 2009: 89-90). Moreover, regarding the symbolic dimension of the Cuban revolution perceived as an ongoing process, the special period may have served as a *purifying* experience, as it allowed for open criticism of Soviet socialism, while emphasizing the "Revolution's Cubanness", as well as "the Revolution's socialist set of values, including free health care, education, and social equality" (Gropas 2007: 538).

Indeed, up until today, many Cubans living on the island – even critics of the government (Gropas 2007: 535) – seem to associate the Cuban revolution with the above-described principles and values, such as social equality, sovereignty, anti-imperialism, and the work for the common good.[9] The historiography of the Cuban revolution and its emphasis on such *Cuban values and morality* thus appears to play an important part in ensuring continuous support for the political projects of the revolutionary government. Certainly, the transition from Fidel Castro to his younger brother Raúl in the year 2008 led to important political and economic changes (e.g. Hoffmann 2016). These include, for example, the frequently mentioned changing policy towards the private sector, and especially the wave of liberalisations of *cuentapropismo*, that is, of small self-employed businesses, which are vital to the Cuban economy (e.g. Ritter and Henken 2015). However, as pointed out by Farber (2011: 2),

> *the Cuban regime has for more than twenty years managed to survive the fall of the Soviet Union – its principal patron and senior ally – and the East European Soviet bloc. In the company of North Korea, it continued to exist during that period without a major turn toward capitalism, as has been the case with China and Vietnam.*

Indeed, looking at the example of self-employment, the prediction of a turn from a state- to a market-led society appears to be a risky undertaking. In 2017, the Cuban government announced a rearrangement of the private sector, including a halt in the issuing of licences for several self-employed activities (Puig Meneses 2017). There is reason to believe that the announced resignation of Raúl Castro and the change of government in April 2018 will not lead to abrupt changes in the actual political course, so that the continuation of the *revolutionary process* may be ensured. Yet, with the substantial changes that this process has undergone since the beginning of the 21st century, the question whether and to which extent the *revolutionary values* discussed above will survive in revolutionary rhetoric and as a pillar for the revolution's popular support, remains to be seen.

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[9] While there certainly are significant differences in this association with regards to different generations (see, for example, Krull and Kobayashi 2009).

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