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REPRODUCTION OF POVERTY AND RECENT TRANSFORMATIONS IN CUBAN WELFARE REGIME IDENTIFYING CHALLENGES TO SOCIAL EQUITY

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# Reproduction of Poverty and Recent Transformations in Cuban Welfare Regime. Identifying Challenges to Social Equity

Angela Isabel Peña Farias

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## I. INTRODUCTION

Poverty has become a critical challenge to the struggle for human development in modern world. There is no country or society actually free from its perverse presence, and it continues being a shadow for every social and economic achievements. The analysis of how it is reproduced and how states and civil society articulate their positions upon this matter, frame the approaches of many studies on poverty. Acknowledging the role of social institutions in the process, inequality, labor markets and welfare architectures occupy central attention in order to clarify the conditions surrounding the reproduction of this phenomenon.

Poverty primarily has to do with spiritual and material deprivations interconnected to the difficulty or impossibility to expand human capabilities, in a spatial and temporary delimited context. Its reproduction makes reference to the chronic nature of the limitations for human capabilities that relays on everyday life reproduction (Sen, 1997).

From a sociological point of view, causes of reproduction of poverty have to do with the combination of structural and agential dimensions, which set a system of conditions that surround peoples' lives. In other words, such explanation of reproduction of poverty elaborates on how people internalize this set of

conditions, or opportunities, and consequently externalize strategic practices. This repertory of strategies are based on people's interpretation and objective opportunities in a welfare regime configuration. The original concept of welfare regime refers to the ways in which the production of welfare is distributed between State, Market and families (Esping-Andersen, 2000, p. 102).

In this perspective, the reproduction of poverty is related to the extent welfare becomes de-familiarized/familiarized or de-commodified/commodified, and to the ways people in different social positions are capable of modulating the impacts of this structure in their everyday life reproduction. The discussion regarding welfare regimes and their impacts on reproduction of poverty, questions how modulations in welfare architectures modify equity opportunities, and influence regional, collective or individual's incomes, labor benefits, educational achievements, social security, among other human development requisites.

In Latin America, region for several years highlighted as the most unequal worldwide, multiple historical configurations of development and welfare regimes has been signed by many different ideological, economic and political scenarios (Martínez, 2005). Within the region, Cuba presents a particular context, specifically in its welfare architecture which promotes a development strategy oriented to guarantee citizen's entitlements as a key factor for economic growth. But despite political and social will for more than fifty years, poverty has reproduced on multidimensional basis. Above all, recent years have assisted to important changes implying a profound reform of welfare and economic trends in the country, after the launch of the New Lineament for Economic and Social Development, by Communist Party in 2011, basis for the Actualization of Cuban Development Model. The main idea behind these Actualization, is to enhance Cuban strategy for economic growth and macroeconomic balance, without affecting the social achievements already accomplished (Murillo, 2014).

Present paper exposes a discussion about how current transformations in the Cuban welfare regime has an effect upon the reproduction of poverty in the country. The analysis starts with a brief presentation of welfare regime transformations, in the Actualization of

Cuban Development Model, and about the situation of poverty in the country. It later elaborates about the limited capabilities of poor families to face current welfare regime reconfiguration and overcome poverty. But first, it is important to present the theoretical and methodological grounds that sustain the analysis<sup>1</sup>.

a) *Basis for reading relationships between welfare regimes and reproduction of poverty in a Cuban context*

The most recognized reference about welfare regimes is the work of Esping-Andersen. It consisted in the elaboration of institutional models of welfare, formally constituted in concrete Welfare states. From his work, countless interpretations have been made to explain the processes of de-familiarization and de-commodification of welfare, and how they have influenced social stratification, family solidarity and social exclusion, in different contexts.

This kind of approach focuses on dimensions like the set of provisions and responsibilities given to different actors in the system. It emphasizes in how the variety of welfare systems have absorbed responsibilities traditionally assumed by families. Configuration of welfare differs between social protection schemes and development models. Civic and social values, institutional structures, different paths toward modernization and industrialization in a historical perspective, among other factors, have configured models in which groups and individuals meet their necessities or reproduction (Therborn, 2004).

One of the critics made to this approach, above all to Esping-Andersen classic proposal, argues that typologies centered in formal institutional descriptions of Welfare States don't reflex the factual arrangements that configure welfare opportunities to every social strata, and that such models are not suitable for developing countries or social systems other than welfare states (Messina, 2010).

Nevertheless, the use of welfare regime approach provides the analytical frame for revealing the connections between Social policies, market interactions and families' informal networks, as they are connected in everyday life, whether they are covered or not by formal institutions. This analysis can be used to study realities beyond the ways States postulates, for example, the attention to poverty, or regulations over labor market.

Especially in cases like Cuba, where there isn't a specific policy oriented to poverty reduction, it is necessary to guide the analytical thinking towards questions such as how poor people "meet" their needs

of reproduction, and how is it possible to find expressions of reproduction of poverty in a universalistic social policy system.

In this system, social policy could be seen as the set of principles and actions that determine distribution and social control over welfare in a certain population, by a political trend. Social policy are regulation tools based on the hierarchal distribution of power (Herrera & Gaston, 2003).

Market could be understood as the mediation of economic patrimonies in wellbeing guaranties. Also, for the significance of social labor division in this mediation, market is often concreted, formally or informally, in labor relationships and labor's institutional world. Its role is usually studied by the ways States regulate or deregulate the action of market on employment, the security of labor force, and on the opportunities of insertion in labor structures (Migueluez & Prieto, 2001).

Family support networks make reference to systems of relationships that emerge spontaneously between family members, and with other institutions, individuals or groups. Such relationships are loaded with social capital, involving reciprocity norms and mutual trust (Flaquer, 1995).

This set of relationships is usually regulated by public policy. But actually, concrete arrangements go beyond regulations, and are structured based on the ways current people adapt to their position in social space. Micro practices configure new sets depending on the quality of family social networks and on their cultural, social and economic patrimonies, among other factors.

In societies with a strong presence of informality, there is a whole world of opportunities (or their lack) that exists paralleled to formal welfare system. In this combination of formal and informal institutions, family strategies plays an important role. Family strategic practices for everyday reproduction, express the ways in which concrete people bend formality into their own conditions and alternatives towards survival or social mobility (Martínez, 2008).

With this statement, the research was focused on explaining how poor families in two specific areas of Havana, Cuba, recreates formal welfare system, and display particular arrangements between State social policies, market and their own informal support networks. It is centered as well in how these recreations limit the opportunities of overcoming poverty in context of changes in Cuban formal welfare regime. These questions can be thought all the way around to reflect upon how current changes in Cuban welfare regime, affect the opportunities of poor families for overcoming poverty, hence, contribute to the reproduction of poverty.

For this analysis, it is necessary to characterize the changes to welfare regime in current Cuban context; to analyze the coping strategies that poor families in

<sup>1</sup> This paper is a result of a fieldwork research carried out from 2009 until 2014, in poor areas of Havana city. Title: The reproduction of family poverty from the perspective of welfare regimes in Cuban current context, 2014, University of Havana, PhD dissertation.

concrete neighborhoods develop in order to face poverty; and to identify the balances and particular ways of interaction between state, market and informal support networks in coping strategies, compared to the demands for wellbeing in formal macro structural welfare regime changes.

In this analysis, the attention is paid to the interactions and arrangements between State, Market and family support networks, which are sustained by family coping strategies in everyday life. It is in family where access to welfare is expressed, and it is from family that individuals interact many times with other welfare institutions. With this byline, the source of information required for the study are family members, especially the head of the households in poverty conditions, in the selected areas of the city.

In this study, families who participated live in two poor neighborhoods of San Miguel del Padrón, and Arroyo Naranjo municipalities, in Havana city. These neighborhoods, Residencial San Miguel and El Moro, respectively, were chosen due to their lower urbanization and social development compared to others in the city. They are located in the periphery of Havana and they were suggested by experts and key informants as likely scenarios where to conduct the research.

Poor families were identified by a dichotomy classification that distinguish poor from not poor families. For this identification method it is common to use income and housing conditions of the families and households as main analytical variables (Paz, 2010). This perspective was combined with profiles created from research antecedents in Cuba, which affirm that Cuban poverty is characterized by low income, insufficiencies for acquiring a basic basket of goods, and the precariousness of housing (Zabala, 2010). These criterions were completed with the conditions that chosen families should dwelled in the selected areas for more than 5 years. In total 22 families were contacted, and this number was set by the saturation principle. Concrete selection of families was conducted under the snow ball procedures in a theoretical sampling (Rodríguez, Gil, & García).

In depth interviews with head of the families and other members, all together as a group, make possible that gathered information represented the actual conditions and strategies of families. These "group interviews" were combined with the information provided by key informants like officers from social services and policies institutions in the selected communities and municipalities. Also observations to these areas contributed to select the families, and to complete the information about their daily lives. The fieldwork was conducted between 2009 and 2013, and updated in 2014.

Qualitative analysis was conducted in two main direction. One was looking for the objective opportunities these families have and what they

understood can count on in everyday life (interactions between State policies, market relationships and family social networks); while the other was focused on how such arrangements and interactions once stable and regular in time, make these families vulnerable and limit their capabilities for resilience in a Cuban current context.

In this analysis, any dimension was understood like "states", by the opposite, each of them was articulated with the limitations they imply for the families, regarding overcoming poverty. Wellbeing dimensions in this case were constructed by the combination of different theoretical perspectives about welfare and poverty. From this combination five dimensions emerged:

- Possibilities for a healthy live (includes health, nourishment, quality and security about habitat);
- Access to education (includes level of education, cultural, political and citizenship orientation and information);
- Opportunities for being a social agent (includes social and political participation, autonomy, employment, incomes and consumption);
- Social inclusion (includes sense of belonging, social protection and cooperation);
- Emotional fulfillment (includes self-value, sense of plenitude and realization) (Peña, 2014).

The analysis reflects about norms, legitimized behaviors and regular interaction of State, market and family support networks in family strategies and practices on each dimension. Coping strategies express poor people imaginaries and daily deliberate practices toward life reproduction in the dimensions of welfare they consider more urgent or necessary. These strategic actions recreate a system of interactions that if allow poor people to survive, limit their real opportunities to overcome poverty.

Analytically, the exposition of the findings comes from a brief description of what is changing in Cuban context that challenge such strategic practices of poor families, and continues with the analysis of families' poor conditions and coping strategies based on what informants narrative expressed. The informant's discourses play a significant role not only providing the information but inspiring the logic of analysis exposition.

*b) The revolutionary social protection model and the constitution of welfare regime in Cuba. The context of changing*

The traditional concept of social development sustaining Cuban social policy, postulates the necessity to grow in the integration of living conditions and material welfare, equity, transformation of social values, and social behaviors-relations (Ferriol, Alvarez, & Therborn, 2004, p. 23). Based on equity and social solidarity, the foundations of this model has considered



that social and economic projects should be simultaneous. But this idea is becoming flexible in the New Lineaments for Economic and Social Policies, which were approved in 2011 by the Sixth Congress of the Communist Party (PCC), and are strengthened by the Seventh Congress in 2016. In these lineaments, it is ratified that no one is going to be left unprotected. But the expression of this idea shows certain priority to economic growth over social protection, resulting in a contradiction with the very foundational basis of “with the humble by the humble and for the humble” defended as a starting point of equity and social solidarity in Cuban socialism.

Despite these recent subtle changes in discourse, it is possible to affirm that traditionally, Cuban model has been essentially de-commodified, strongly based on State responsibility, with some elements of familialistic behavior. It means that until 1990s, most welfare guaranties depended on social policy regardless individuals or family revenues. Services and provisions accesses were unsubordinated to consumption capacities of incomes, and unrelated to any type of social contributions of citizens, or social class positions, considered as part of universal citizenship rights. Anyhow, the emphasis on State responsibilities during this period, didn't exclude the recognition of families and non-governmental organization as supportive actors of welfare architecture.

This traditional model has received progressive formal and informal modifications during the last three decades. The turning point for these transformations was the decade of 1990, mainly due to the disappearance of communist bloc, and the reinforcement of USA's blockade. The economic crisis which begun to take part in Cuban development conditions ever since, compelled Cuban government to implement a group of measures in the economic and administrative fields that implied changes in social protection. Such formal changes, also conducted to informal transformation in social fabric, which made difficult the identification of an unequivocal welfare regime model after the nineties.

Though social policies continued managed and ruled by the State, between 1993 and 2000, several changes postponed the expansion of social goals, and introduced transformations in the design of provisions and services. Some of them were to give more responsibilities to local levels, and new institutional frames, with the participation of NGOs in the management and funding social policies programs.

In these years, labor market experienced a first big contraction leading to the expansion of self-employment and the reduction of State employment. This situation introduced informally a deregulation of labor market, and retracted State responsibility in the accomplishment of decent full employment principle. It was not legal for private entrepreneurs to freely hire

employees, but the process started informally without rules for labor force protection in the private sector.

The irruption of market in welfare provision during these years was evident in the dependency, not formalized, from family or individuals patrimonies to access goods and services, traditionally guaranteed by the State. The reasons for such informal changes had to do with the economic contraction that affected the quality of State services and responses to social demands, with the existence of a parallel or black market, and with the reorganization of labor participation as a platform for welfare.

Those adjustments were related to factual adaptations, not sustained in a formal retraction of the State roles in social development. Actually, the political will of the government and the accumulated investment in social services infrastructure created in former periods, allowed to keep and even develop most social achievements like children schooling, high life expectancy; low prevalence of diseases caused by infections, low child mortality rate, among other indicators (Ferriol, Alvarez, & Therborn, 2004).

Formally, to face the crisis meant to emphasize the responsibilities of the State. An example of this is the behavior of social expenditure in relation to GDP: while the State budget decreased around 9% between 1989 and 1996, expenses in social field grew up a 17%, keeping its proportion respecting GDP (Ferriol & et al, 1997, p. 65). But closing the decade, new taxation systems began to take place based on the new Tax Law of 1994. After that, direct economic basis of redistribution were reformulated, with a larger implication of civil society (self-employees small entrepreneurs) compared to former periods.

Nevertheless, social expenditure continued as an important element of economic performance and development in the country until today. In 2009, largest State expenses were concentrated in human development dimensions like education, health and social security and assistance (51.1% of the current structure of State expenses). During first decade of XXI century, new social programs were created to assist vulnerable people like lonely elders, such as Communitarian restaurants, free medicines, among others (for more details see (Castiñeiras, 2004).

Described conditions express the political intentions to keep the coverage and quality of the social services. But the decrease or low economic growth during the last 20 years, caused that the government wouldn't be able to sustain all services and provisions that were broadened during former years, above all after the impact of 2008 global crisis in the national economy. The continue overcharge of State social expenditure without enough economic support during following years (Espina, 2010, p. 232), made Cuban social policy to go through new adjustments. Again, in the very base of transformations is the problem of efficiency and

sustainability of Cuban economic development model. It all makes ineludible the discussion about how to keep those levels and structure of State expenditure without a sufficient economic platform, how to transform Cuban economy into a sustainable base for human development in the country.

As a response to those questions, in 2010 the Communist Party elaborated the New Lineaments of Development for the next period; they were approved during Party's Sixth Congress in 2011 after popular discussion. New objectives or economic goals with a large social impact were appointed:

- To increase national incomes (export) and diminish expenses in foreign currencies (efficient substitution of importation);
- To enhance productivity rates;
- To reduce social expenditure;
- To reduce superfluous employment (Triana Cordoví, 2010, pp. 12-13).

Socially, employment became a central and critical aspect of the conditions for Cuban model actualization. In this field, new scenario demands as well regulations that enhance the revalorization of work as a legal source of income, the increase of nominal and real wages as a strategy for improving productivity of labor, and the reversion of the deregulated behavior that informality and self-employment (private) assumed for a portion of active labor force in the country.

Associated to this issue, self-employment and private entrepreneurship are intended to assume former State workers in a new labor world composition. From 228.1 thousand employees in the sector in 2010, in 2013 they increased to 424.3 thousand in 2012, around the 35% of total employees in the economy (ONE, 2013). This, inevitably, has brought transformations not only in the employment compositions, but to the entire components of social structure.

Still, State employment represents the biggest portion in labor composition, but its workers experience the impacts of increased disparities between nominal and real wages, which become more evident in family's economies. These disparities are related to the price fixation policies of government, which recharge consumers not only because of the devaluation of domestic currency, but because of the high prices to products of high demands (Rodríguez J. L., 2011, pág. 33). This situation is thought to be alleviated with recent price diminishment, but it actually haven't eliminated the basic salaries-prices contradiction for most State employees, and other social groups.

The complexities of the situation are documented by recent studies about employment in the country and specifically in Havana. These studies confirm a path from a relatively homogeneous labor world, to a labor market evidently heterogeneous and

unequal. This labor market is formed by sectors of occupations which incomes are not enough to satisfy basic needs of large populations. Also in this new scenario, informal and non-State sectors let very often higher incomes than those from state or formal offers (Espina & others, 2004, pág. 7).

This situation represents at least two central issues regarding welfare regime: first is the problem of sustainability, institutions and actors correlation in welfare production, in which other actors like market are starting to acquire more responsibilities; and secondly, are the reforms to labor market specifically, social security and social provisions, were more individual and familial responsibilities are intended. In both cases, welfare and its limitations are formally consequences from the participation of individuals, families, and communities strategic adaptations to this context. In adapting, the different sort of resources and patrimonies unequally distributed in society play a more significant role.

This brief description calls the attention about how to keep ethical principles and traditional behaviors of Cuban social protection in social development today. It also highlights the social consequences of changes that accentuate inequity in this context. For example Gini coefficient at the end of 1990s raised up to 0.38 in contrast to the 0.24 from the 1980s. It was still low if compared to the rest of Latin-America, but it showed a process of income concentration, breaking down the homogenous tendency of former periods (Espina, 2010, p. 200).

Essentially new reforms are centered in the balance of economic indicators more than in developing social dimensions; although it is considered that such dimensions should be as less affected as possible. The new tendencies in Cuban development model are still in constitution because the changes are too close in time, but they have been strengthened with the new measures and legislations approved by the National Assembly and sector ministries after 2012. If historically Cuban welfare regime was clearly de-familiarized and de-commodificated, new scenarios are opening toward more market and family participation. The role of informal social networks supporting families are key factors of the new configuration, now even acknowledged by political leadership (lines 40 y 42) and 25 (line 166)) (PCC, 2011, p. 14).

It means that it is reinforced formal and informally the individuals and families responsibilities in the satisfaction of problems that formerly were almost absolute responsibility of State. As a result, some dimensions of welfare depend on the economic and social resources of families. It won't be just because of deficiencies in social policies formal implementations due to lack of resources, but because of formal retraction of coverage and designs of such policies. In other words, due to the formalization of practices that

were traditionally considered informal. This change will make inequity to escalate, based on the availability of groups' patrimonial resources (PCC, 2011, pp. 23-25). One example: the beneficiaries of social assistance between 2005 and 2010 reduced from 535 134 people to 235 482, as the households benefited by this system went down from 301 045 in 2005 to 116 757 in 2011 (ONE, 2010); (ONE, 2013).

The design of welfare regime in Cuba is now moving toward a central issue present in the discussion about the topic internationally: the acceptable balance in the institutional organization of welfare, between State vs. Market, and State vs. civil society. The tendencies to familiarization, and commodification of welfare in Cuban case, affect differently depending on the individuals and families position in social space. Obviously lower positions, poorest sectors of society, are in disadvantaged conditions for facing the challenges.

Poverty has existed in Cuba as a consequence of many historical and structural factors, but recent expressions of poverty are associated to the economic crisis after 1990s and the related political and economic measures already explained. In 2006, and since 1999's evaluations, it was affirmed that poverty in Cuba reached the 20% of total population (Ferriol, Ramos, & Añé, 2006). Other recent reports, sustain the same figures proving the persistence of this social problem in Cuban society. This situation is also related to social exclusion, weak connections with social protection services, and other conditions mainly in slums and irregular neighborhoods formed by internal migration in largest cities.

Although there isn't new official data about the extension or intensity of poverty in the country today, it is evident that new scenarios are unable to generate work sources and proper retributions that could reinforce structural mechanism of social inclusion related to employment. The combination of reconfiguration in labor market, low incomes from majoritarian state employments and pensions, and the formal or informal increase of market mechanisms in welfare provision, especially those linked to consumption, are among the main conditions that difficult overcoming poverty regardless other State initiatives such as subsidies for food and housing for vulnerable groups.

The main condition for reproduction of poverty from a political perspective has to do with the fact that Cuban social policy system doesn't recognize poverty explicitly. In consequence there is no policy or program systemically focused on poverty as a complex phenomenon. Although some programs identify vulnerable population, the lack of a multidimensional and dynamic understanding of the problem make impossible its solution in upcoming years.

Lack of macro structural data, and suggestions from context analysis, justify this study not to focus on social policies themselves from a macrosociological

perspective, but to narrow the study to the very base of social reality: How families arrange the interaction between what they receive from State, what they need to solve in market relationships, and what they can satisfy by their informal support networks; how they cope with everyday life based on the resources they can activate, which are provided by welfare regime formal configuration and informal adjustments.

It is possible to propose that as inequality patterns are reinforced with recent changes, different everyday life strategic practices will institutionalize different arrangements between State, Market and families, under the same macrostructural welfare architecture. This logic allows to analyze the effects that macro-processes have in micro-space reality of poor families, and it also highlights the necessity of completing information about the phenomenon in Cuba.

To prove not only this fact, but that current changes are reinforcing the conditions for reproduction of family poverty, next pages will explain the main thesis of this paper supported by fieldwork research about concrete twenty two poor families in selected urban areas like Residencial San Miguel and El Moro.

c) *Thinking about welfare regime and reproduction of poverty: from family coping strategies to contradictions between formal and informal welfare arrangements*

In these 22 families, 12 were from Residencial San Miguel and 10 from El Moro. Total population was 89, from them, 39 men and 50 women. Thirteen families were from five to eight members sized. The smaller were constituted by elders, or single mothers. Most of the sample represented black or mixed people. These brief information expresses the complexity of poor people in Havana, where there is an overrepresentation of single mothers, old people, black or mixed population, majorly with low educational levels.

As it was presented, and defined by qualitative approach, five dimensions of wellbeing were followed in the study. They were opened to the narratives of informants, depending on what they considered more important in each case, and what they do to satisfy the needs they have regarding each dimension.

*Quality of education and health in everyday life...*

From this population, 25 were under 18 years, and all were attending schools, even three children with disability. This fact corroborates the accomplishments of universalistic Cuban social policy toward education. Nevertheless, from adult population of this sample, there are just seven who finished university studies, and 30 adults just finished high-school. Educational dimension analysis of this families reveals that most of adults actually at some point of their life dropped off school and only completed the legal compulsory academic levels. As a consequence, these people don't count

with any capacitation that allows them to be competitive in labor market.

Local authorities either develop any capacitation in these neighborhoods in order to provide families with tools for overcoming disadvantaged positions. Most of the information they use to respond to everyday demands or for any project come from relatives, friends, and neighbors, which reinforce their constrained capabilities for innovation and overcoming limiting conditions.

In the other hand, the existence of universal health policies, provides access to medical attention and even focal assistance to patients with economical disadvantages. For this reason, poor families in this context are not necessarily in bad health conditions, or neglected in their right to medicines, special treatments or any other health requirement. However, interviewed families affirm their problem with health is related to the quality of the services, which they consider lower than in other areas of the city.

Related to health dimension, one important aspect is the quality of the neighborhood's habitat conditions and housing. Lack of communal hygiene and insalubrity characterize the areas where these families live. This deterioration of habitat environments is combined with the bad situations of the houses. Poor families dwell in buildings made of disposable materials, in spontaneous constructions, and even in spaces illegally occupied that were not originally built as houses. This situation reinforces the marginality of such neighborhoods, actually, informality is the main characteristic of their dwelling conditions. This informality is based on inexistent documents for ownerships, transition of houses without legal approval, and illegal occupation of spaces:

*"...this was a storehouse that... we had to come to live here because of our needs, we don't have property or anything like that. I lost my former house, and I occupy this place... I know this is not legal"* (family 2)<sup>2</sup>.

The legal tenancies are based on free usufruct over housing, from all families, just two were owners of their houses. Anyhow, poor families in these areas refer to this issue as the most stressing worry they have, because it is also common the difficulties in water supplies and other services provisions related to housing. In general terms, this condition is one of those characterizing poverty in urban areas like Havana's slums.

With the notion of this precariousness, families use to demand public institutions to solve their housing vulnerabilities. Their main strategy for dealing with housing and habitat conditions is to request attention from formal institutions. Nevertheless, lack of material

resources has limited as well local institutions responses to the situation:

*"... I will give you an example, here construction plans are directives, and it also has to do with the economical limitations of the country. Here in Arroyo Naranjo, I have to build 73 houses a year, but this is a minimum percentage of what I need to do actually. If I want to solve the housing problem I would need to build 300 houses a year..."* (Officer of Housing Investment Municipal Unit- Arroyo Naranjo)<sup>3</sup>.

Other problem related to health dimension is linked to nourishment. Interviewed families agree with this one as the main privation they experience. In this aspect, the State provisions also play important roles: *"...meat, I just eat it when the government provides it, because it is too expensive, and we can't buy meat otherwise..."* (Family 8). Although the offer only satisfies a small part of population demands, these families refer to depend on the per capita food subsidy from universalistic Cuban State policy. Other aid supported by the State is the focal State program of communitarian restaurants for old people without family support. Though the program is thought for lonely elders, others with low resources benefit from their offers.

But basically, strategies for coping with this limitation are related to adjustments in consumption, reorganization of feeding frequency during the day, and a distribution of food among family members by which children, ill and elders, are privileged. Other strategies for coping with lack of food is to harvest in gardens and backyards and to exchange goods with neighbors and friends: *"... here we help each other, if a neighbor needs mango for children's juice, we are always available for helping..."* (Family 9). In this aspect, family support networks play a role in solving emergent and short term needs, while State offers play the main part in the long run coping.

However, this specific issue is strongly related to incomes. The dependency on the State provision, regardless their limitations in resources or quality, has to do with the restrictions that a reduced patrimony imposes to these families. As it is logical to think, it is important then to understand the conditions of the families under study regarding the third dimension. This one has to do with the opportunities of families to be a social agent, including employment, sources of income, social and political participation and institutional dialogue among others. It is important to pay closer attention to these issues in order to continue the analysis.

*Families as social agents: what they can actually do*

The opportunities for becoming and acting like a social agent, imply first of all the possibilities of

<sup>2</sup> From now on each family quotation will be identified by the number of the family in the study, which is determined by the order in which they were interviewed.

<sup>3</sup> In the case of quotations from officers from formal institution it will be named the specific institution and the municipality they represented.



economic integration and direct incidence in the development of social life. Starting with employment, it is the opinion of an officer of Municipal direction of Work and social security ministry, that by one side, local population has the right to request for employment, or pension, but by the other side, institutions not always count with necessary resources for satisfying the demands: *"we do give them response to requests... dissatisfactions are very clear... Everyone who comes for a job, may not get a positive solution, but we tell them that as soon as the country is ready... there are also opportunities in private sector. There are people who come asking for a rise in the pension, because they say it is not enough, not even with the subsidy for food and medicines, is not enough, and we still have these dissatisfactions* (Officer of Municipal Direction of Work and Social Security Ministry- Arroyo Naranjo).

However, in poor families under study, jobs are provided by the State: 27 persons in the group of families work for the State, specifically in the sector of services. Other persons are pensioners. This fact corroborates that most of poor families in Havana actually have adult members working for the State, but despite the certain security it provides, low salaries and no other regular source of incomes limit consumption capacities of the people; and with this, limit their possibilities to not depend on State focal programs for vulnerable groups.

Total incomes of these families were from 200 to 700 Cuban pesos a month per family. Per capita average income was around 120 pesos a month. Comparing this information with the calculations made by Cuban analysts, it is demonstrated the poverty of income characterizing social reproduction of these families. This is strengthened because none of these families had any member involved in legal self-employment or private activities, though it was common the reference to sporadic informal practices in order to increase family incomes.

The main families' strategies for facing income limitations include the exchange of remittances between friends and relatives: *"I tell you, one day my sun gives me 20 pesos, other day my other sun gives me, and so on"* (family 8); *"...sometimes my family from abroad send money, my sun in law also gets sometimes, but this is very seldom, just to help with something very specific* (family 9).

Also, as it was said before, informal economic practices are frequent. They consist in selling products harvested or manufactured by the family, speculation with products that were purchased at lower prices in other areas of the city, and in offering services to neighbors.

The reference to these activities highlight the limitations they face in developing incomes from a formal source, or related to regular employment or pension. The difficulties for such achievements are

related both to low wage in State employments, and to the limitations their education and social capital imply for any other employment strategy. For these reasons, these families are tied to irregular sources of incomes, also limited in guaranteeing any level of consumption sufficient for sustainably satisfying their needs.

This limitation as it was suggested, makes them dependent on the services that are provided by the State, and diminishes their possibilities to be more proactive in the new welfare reconfigurations. From this point of view, it is important to pay attention not only to the services themselves and their quality, but also to how these people can turn these provisions into opportunities of becoming social agents (Sen, 1999).

Regarding services and their quality, families agree that in their neighborhoods there are deficiencies in the policlinics; that food from communitarian restaurants is insufficient and bad elaborated; and that they don't count with any leisure possibilities, parks or other recreational area in the community: *"this is an unprotected area, we don't have any significant here, nor a park, nor a common area to organize activities (...)* we just have a pharmacy nearby, and no gastronomic offer or something like that..." (Circumscription Deputy - Residencial San Miguel).

Despite the offer of subsidies and other focal services to vulnerable groups in the territory, for these people such services don't provide any real impact in overcoming their dependency, cause they can't be turned into overcoming poverty. The very existence of such services justify the nomenclature of a protected poor that have been used by some analyst in the country (Espina, 2008).

Anyway, the analysis of this dimension, emphasizes in the formal institutional limitations to provide real possibilities to overcome poverty, but at the same time, it demonstrates the importance of these provisions for these families' survival. Speaking about strategies, formal institutions become central aspects of their fundamental support.

Actually, these families not only approach formal institutions to receive their assistance services, but also to dialogue and impose demands. But if they can really exercise their right to participate and demand from public institutions, their critics are related to the real impact this participation may have in their everyday life's transformation.

Regarding this issue, it is possible to affirm that these families have a limitation in the exercise of their rights, though they actually use them. It is not due to inexistent channels for imposing demands and dialogue with authorities, but because the ultimate purpose of this dialogue doesn't operate in the way of changing poverty conditions for these families throughout participation.

Families' participation in social life is expressed in the assistance to communitarian forums,

accountability meetings with local deputies, and the demands about family or community complaints to formal service institutions: "...people bring problems to the Council but we have always had problems with resources" (Circumscription Deputy -El Moro); "in the assemblies you go, say things, they say they are going to do something, but at the end, nothing from nothing" (family 6).

In this dialogue, deputies' conception of participation means actually that family shall execute decisions made from "above", to be involved in the communitarian activities that authorities have designed for them. This discourse expresses a contradiction with what families expect public institutions. It is translated into a particular way of dialogue: families identify the channels, go through them to claim for their needs, but they don't actually trust those institutions would solve the situations in the short term. Practical difficulties in this issue are not related to a deficient understanding of institutions' missions, or lack of knowledge regarding how to communicate with them, but to the negative evaluation families construct about institutional performance.

Despite this evaluation, there is no development of communitarian or family initiative alternatives to formal institutions display. Instead are common reflections like: "...we don't have other strategies because we are adapted to what we currently have, we are educated to accept what we have" (family 6).

The combination of the factors discussed in this dimension put boundaries to resilience capabilities of these families, due to their high dependency of formal institutions, and the limitations these institutional performance has. It makes to think about the restrictions these families have for facing institutional changes already in place, and the lack of social programs that would go beyond assistance toward promotion of overcoming poverty.

It is possible to see the complexities of this institutional dependency when some interviewed affirm: "I expect a better future for my family (...) we do can have it, why not, I we have the Revolution..." (Family 8). And of course, this situation already described, has implications and is also affected by the way these families perceive themselves, and value themselves. The quality of State provisions and the reproduction of dependency, generate feelings of self-devaluation and inequality that comes associated to structural aspects of their situation. The development of unhappiness and frustration by this side, is pooled with other supports that supply social inclusion and meanings to their lives.

d) *Feelings are part of wellbeing: social inclusion and self-perceptions*

Last two dimensions of the analysis are related to the possibilities and the way people develop sense of belonging and social inclusion, also to the feelings

people generate about what they can be and feel able to do. The dialectic between feelings and perception or subjective reality and objective opportunities is so complex that in this case just some specific connections were highlighted depending on what was expressed by the informants.

Starting with the strong feeling of inequality, these families perceive their neighborhoods are receiving less attention than other areas of the city: "sometimes I am frustrated because in other places I see things getting better but here is not the same" (family 9).

In this aspect inequality acquires the tone of territorial grounds. Related to this, the residence in these specific neighborhoods plays important role in the vision of themselves in society. But this perception about the neighborhood is not monolithic, actually is also complex as it is split into two different set of arguments: one is built about the neighborhood as a whole, as a community; and the other is constructed taking into account the closest neighbors who are part of their social support network.

In the first group of ideas some families affirm that people in the slum "have such a negative mind that are all the time thinking how to do something or play head, drinking rum, to burglar working families' houses and so on..." (Family 15). These opinions differ from ideas about the closest circle of neighbors: "here everybody knows each other, and for example if I have a problem in my family, they support me, they help me" (family 8).

This reciprocity and social capital implied in this close relationship support most of social integration and positive sense of belonging for these families. The sustainability of this social capital is guaranteed by everyday exchange of favors and goods that help each other to face daily life. The possibility to activate this networks in moments of needs and tribulations are important supports for survival, emotionally and objectively. The only condition for the existence of this mutuality is precisely the expectancy of reciprocity.

The intervention of this support is produced due to the contraction of consumption possibilities by incomes and real salary, and also because of the limitations of formal institutions performance. Informal support networks also carry out functions not formally assigned to any welfare actor. For example they are very active during stressing situations like death, deceases, or any other type of suffering: "when my mother died, I was alone here, but a neighbor who lives there, immediately came here and helped me" (family 3); "when my granddaughter was ill and interned at a hospital, my neighbor gave me 20 pesos for buying food" (family 2).

It is interesting that despite this relevance of social capital in informal support networks, not only emotionally, but also instrumentally, they don't replace



formal institutions grounding their expectations for the future.

Both for explaining their poverty conditions, and for thinking about future overcoming of poverty, formal institutions, which up to now are State institutions, occupy a central position in their imaginaries: *"I need this and that, but I can't have it because the State won't give it to me"* (family 7). It means that their interpretation of causes and solutions are embedded in State responsibilities. They consider their own responsibility, just in make good use of what the State can provide. In this, education of the children is thought as one of the most important use. This is related to the ultimate aspiration of breaking the cycle of reproduction of poverty with a generational perspective, rather than in everyday life basis. Anyhow, as it was seen, there is no strategy rational and organically oriented to this goal. An important limitation here is that families don't understand the links between everyday life and long term achievements.

But how this reality of practices, conditions, understandings and perceptions reveals a particular interaction between State, Market and families; and how their dialogue with recent changes in welfare regime contributes with the reproduction of poverty. These are the questions addressed in following reflections.

e) *Formal and informal welfare arrangements. Insights to contradictions*

Informal arrangements are expressed in the regular configuration of interactions between social policies, market based exchanges and support networks. These interactions are as well evident in the coping strategies implemented by families in everyday life. Such informal arrangements actually deal with formal organization of welfare architecture, and depend on the resources families may display attending to their positions in social space.

Welfare regime in Cuba is moving toward a readjustment of traditional roles of State, Market and families. In this movement, the State is delivering or intending to share responsibilities with families and opening legally spaces for the action of the Market. As it was possible to see, the potential action of market in everyday life reproduction of these families is almost inexistent. It means that current changes place a contradiction between what these families implement as strategies for survival, and what recent adjustments demand families must assume as formal responsibilities. Family support networks are in this situation, vital for sustaining stability of the entire system despite the contradiction.

Though State formally still remains as the central actor, and so it is for poor families' strategies, State retraction in some aspects reinforces families' limitations for overcoming poverty. This retrenchment is more visible in labor market composition and

institutions, reduction of the amount of subsidized products that now has to be purchased based on offer-demand prices, and the existence of market action spaces (black or informal market) outer State regulations. Potentialities of families' current strategies for positively turn these changes into opportunities for overcoming poverty are really reduced.

This population so far has only manage to participate from market based relationship in a residual way. About labor market, they don't have conditions or potential for being competitive using education or social capital, nor have economic resources for investing in formal private businesses. This is very important to be taken into account, as the formal projection in this issue is that a large number of workers would migrate from State employments to private or cooperative sectors. This situation means as well reproduction of limited conditions for generating stable and regular incomes in the new scenario, other than state offers.

Regarding opportunities analysis, services and goods provided by social policies incorporate focal programs only with assistance perspective, and are not oriented to change practices, in order to reduce poverty conditions of families. Assistance character doesn't open real possibilities to overcome poverty.

Anyway, it is fair to say that the focal programs they receive are vital for their survival, independently from quality of provisions. The problem is that most of social policies are oriented to universalization of offer, and are not sensible to the impacts of social inequality in the access to their benefits. Universalization of satisfaction requires a combination of focal and universal programs that are not yet developed in the country.

This last aspect has to do with the reduced role these families play in making decisions about their own lives and about their environments. They are just recipients of external and bureaucratic practices that not always respond to their primary need of overcoming poverty. This limitation is related to the design of a policy that doesn't recognize inequity or poverty in the essence of any of its programs.

Analysts affirm that formal institutional arrangements (above all social policies) have a significant role in structuring processes of overcoming poverty, which otherwise intervene in its reproduction. Social policy must focus on poor people empowerment, to increase poor people capabilities and to broaden economic possibilities to access market, specifically labor market (Holmes, Knack, Manning, Messick, & Rinne, 2000, p. 4).

Poor families in the study use their informal support networks as scape valves. This networks help releasing tensions in society in general and in each family's particular lives. But attachment to these networks keeps families tied to reduced resources that if allow them to survive, can't provide a real way out.

Lack of empowerment contributes to reproduction of poverty first of all because it means lack of organizational power toward common goals. And in second place these families can't make their participation and dialogue with institutions positively affect their quality of life. If this analysis is complemented with the behavior of subjective dimensions, and dependency already explained, a vicious circle of negative effects is constantly reproduced on daily basis; which is not expected to be transformed by new welfare regime designs.

f) *Final comments. The challenges of poverty to social equity in Cuban socialism*

Present paper has approached to the factual mechanisms of reproduction of poverty in Cuba, specifically in urban contexts like those studied in this case in Havana City. The main interest has been to reconstruct these mechanisms as they are established in everyday strategic practices of poor families in two specific slums of Havana: Residencial San Miguel and El Moro.

The origin of this analysis is the understanding that Cuban is moving from a clear de-commodified welfare regime toward a mixed model, where the State is sharing responsibilities in welfare with families and market based relationships. So far, the entrance of market is more evident in the reorganization of labor market institutions and in the reduction of universalistic subsidies over basic basket goods.

In this context, poor families are characterized by low level of education and capacitation for active social participation, bad habitat condition and housing informality, difficulties for completing food consumption and basic basket, limitations in quality of local services displays and lack of leisure possibilities. Nevertheless, it is important that these families count on certain provisions of State services that allow minimums requirements for everyday life reproduction.

Poverty in this case is also related to the prevalence of State employments and pensions as regular and stable income sources. Likewise, the lack of implication in legal private initiatives, and the practice of sporadic informal economic activities as a palliative for income limitations are part of their reality. Such palliatives depends on the dialogue with formal institutions in order to place demands to public services, but actually, they offer but limited opportunities to exercise autonomy and social change through social and political participation.

Other dimension of these families' poverty is related to self-perception. This is characterized by powerlessness and dissatisfaction, awareness of inequality and helplessness. Subjectively, these families express a complex sense of belonging. By one side it refers to the community they evaluate as neglected and negative, while by the other side, it refers to strong

neighborhood networks that offer direct emotional and instrumental support.

The main strategies these families develop are related to immediate economic needs such as incomes, and consumption. These actions are rather spontaneous than rational and they aren't elaborated meeting calculated long term goals. Among these strategies are the regulation of family consumption, informal economic practices as complement of state jobs and pensions, systematic exchanges of goods and services with friends, relatives and neighbors.

Also poor families use to demand formal institutions for solutions to their problems. But such interaction though is conceived as a strategic dialogue, is unable to promote real social change, neither for families themselves nor for their communities. In this point it is relevant that strategic practices are centered in family welfare or survival, and they are not conceived upon communitarian problems or common projects.

It is easy to appreciate that some aspects of the analysis are located in this final considerations both as characteristics of poverty conditions, and as family coping practices. The circularity of poverty reproduction in this case is understood in such a way that those conditions of a poor existence become causes and consequences of reproduction of poverty. This understanding relates to the perspective of poverty not as a "state of affairs" but as a complex process, in which practices are not mere reflex of living conditions but a dialectic part of them.

From this statement, the analysis of poverty reproduction, from the welfare regime point of view, reveals that the dependency from state provision and the understanding that State is the main responsible for providing families, basically condense the line of integration between family's situation, perceptions and practices.

Thinking in balances between state, market and informal support networks, it is possible to affirm that everyday life practices oriented to welfare express arrangements in which state has the most important role, while market has a residual part, and informal networks allow adjustments moderating the contradictions between state and market in new scenario.

The problem it implies for reproduction of family poverty has to do with the incoherencies between what families are used to do for coping, and have institutionalized in current practices, and what the State is promoting with new changes in welfare regime regarding families' responsibilities.

This behavior expresses a contradiction between the direction of main changes in welfare regime, and the limitations of family's dependency from State in their coping strategies, specifically in the dimensions that are more affected by current changes. This contradiction represents one of the main



challenges for Cuban socialism regarding social equity today.

From this analysis it is not possible to sustain that current changes are lineal causes of poverty themselves. Causality can't be read as a simple line of connections. In reproduction of poverty other factors actually take place. But in this case, present analysis was oriented to think about how poor people is coming across changes; how such changes, in the ways they are taking place so far, contributes to reproduction of poverty.

This connection actually is evident if macro-formal architecture of welfare regime is contrasted with everyday practices and conditions of concrete families in poverty. The nature of labor market reconfigurations, and the assistance character of focalization, among other aspects reveal poverty catalyzers in current context. The lack of specific response from social policy to poverty reproduction reinforce this situation.

The preoccupant outcome of this mixed welfare regime, without a proper acknowledgment of poverty factors in Cuban context, would provoke a displacement of inequality and poverty from public responsibility toward individuals and families. Negative impacts of this relocation would go beyond the limitations of poor people to face new challenges, but would accelerate loosening social cohesion.

In other direction, naturalization of social inequality and poverty in Cuban society would jeopardize the aspirations of solidarity as the political frame of Cuban socialism. This is why major challenge for the Actualization of Development Model in Cuba consists, first of all, in the public recognition of the problem, the integral analysis of the factors and processes that reproduce poverty in the country, and consequently, the monitoring and adjustment of each new step in its impact over such phenomenon.

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