

**UNDERSTANDING CULTURE SHOCK
THE ADJUSTMENT OF EXPATRIATE SOJOURNERS ON
INTERNATIONAL ASSIGNMENT**

JOHN FRANCIS FITZPATRICK

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ABSTRACT

Expatriate sojourners are often described as experiencing “culture shock” when moving to and settling in a new location. This study challenges the notion of “culture” as a tangible, objective concept that causes a “shock” or a “clash” and argues that it is how individuals and groups deal with the macro socio-political context and micro-cultural situations on a day to day basis that influences how they experience their new environment. In this sense, context is seen as a multidimensional framework for social interaction and adjustment, and this study examines the role that different discourses or worldviews play in interpreting daily life in Cuba, a highly politically sensitive and insular location. Using participant observation techniques, the researcher builds up a rich ethnographic “thick-description” of the daily challenges that international sojourners face when adjusting to a new environment in a particularly challenging location, and, by drawing on accounts of how individuals see the challenges they face and what helps them adapt, describes adjustment as a multi-faceted phenomenon. What is highlighted are the various types of challenges that sojourners experience and the pressures that people and families experience in adapting to new roles in unfamiliar working and living environments. A model for sojourner adjustment is then proposed based on a study of the various social networks that expatriate groups create, and the type and level of personal and institutional resources and social support that might influence adjustment.

DECLARATION

I declare that this thesis is wholly my own work

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Chapter 1. Introduction

1.1 The motivation for the study

Two concerns motivate this research study. The first is the growing trend towards international expatriate deployment amongst an increasing number of global multinationals as a result of globalisation. As a result of this trend, research into how international expatriates adjust to their new environments is also a growing area, largely because of the resources invested in re-location and the damaging effect of relative high rates of failure and premature return amongst employees (Black and Gregerson, 1999; Hechanova et al, 2003). Not completing an assignment can affect confidence and self-esteem, as well as job performance and commitment to a company, while it can also have an adverse impact on the attractiveness of overseas assignments for other work colleagues (Aycaan, 1997).

Initially, many of the reasons given for failure rates focused on “cultural differences” or “culture shock” (Oberg, 1960; Torbiorn, 1982; Bochner, 1982), but more recent research has begun to treat adjustment as a multi-dimensional or multi-faceted phenomenon involving psychological and sociocultural factors (Berry, 2006; Ward et al 2001), situational factors (Black, 1990; Black and Mendenhall, 1991) and non-work factors, such as the role of the accompanying spouse and the expatriate family (Harvey, 1985; Black and Stephens, 1989; Black and Gregerson, 1991; Haslberger and Brewster, 2008; Lazarova et al, 2010). With this study, then, I aim to provide a better understanding of the notion of “culture shock” and how expatriate sojourners, in a specific context, adjust to their new environment.

The second motivation for this research is in response to the call for research into social behaviour to take place in context (Atkinson, 1999; Holliday, 1999; Byram and Feng, 2004), in order to “avoid superficiality and stereotyping” (Young et al, 2009, p. 165). In this sense, “culture” and “identity” are not treated as essentially inherent within given ethnic or national groupings (Hofstede, 1991; Triandis, 1995; Gudykunst et al., 2003), but as non-essentialist concepts, socially constructed and discursively created (Baumann, 1996; Scollon and Scollon, 2001; Holliday et al, 2004; Benwell and Stokoe, 2006). The detailed investigation of situational phenomena can benefit greatly from an ethnographic approach to research, because of its “context-sensitive” quality (Atkinson, 1999, p.646) and its ability to examine culture at the micro level of

“small cultures”, or “small social groupings or activities wherever there is cohesive behaviour” (Holliday, 1999). In this sense, an understanding of the context of study is critical to an understanding of social behaviour within it and it is through ethnography that I seek to explore this.

1.2 The details of the study

This project is a study of international expatriate sojourners based on assignment in Havana in Cuba in which I look to show how they adjust to their environment. By the term “sojourner” I understand individuals who move between different locations on the assumption that their stay, or “sojourn” is temporary and that they will either return to their society of origin or move to another location for a temporary period (Ward et al, 2001, p. 6). I was, myself, a sojourner in Cuba on assignment for three years between 2009 and 2012, and, thereby, was not on location primarily as a researcher. I was there in an official capacity and my immersion in the local setting as a participant gave rise to the rare opportunity to carry out an interesting study of international expatriate sojourners during re-location. I opted to do an ethnographic study, which entails “the extended involvement of the researcher in the social life of those he or she studies” (Bryman, 2008, p. 401), and the opportunity presented itself to establish a rich and detailed account of the life of a group of sojourners in context.

Expatriates come to live, work or study temporarily in Havana for a number of reasons. Although there are no official figures available for the total number of sojourners in Cuba, it is possible to piece together a profile of sojourners in Cuba from a number of sources. All visitors to Cuba intending to work, study or do research need an official visa and a local sponsor in order to be able to carry out any kind of professional activity on the island, although many sojourners can visit with a short-term tourist visa. Currently, there are some 175 embassies in Havana (90 with resident ambassadors) and an estimate of some 1,000 diplomats living at any one time in the city (MINREX, 2010). Diplomatic postings are usually from 2-5 years and amongst this group there are employees from a range of international organisations, all officially recognised and with diplomatic status (though with closer day to day working links with Cubans), such as UNESCO, FAO, the British Council and international aid organisations. The main advantages of diplomatic status are diplomatic immunity, access to the import of duty free goods and the support of an embassy when adjusting to everyday life, although this support can vary a lot, as we

shall see below. Many of those that have diplomatic status are not career diplomats, but professionals who have diplomatic status for the duration of their sojourn, which is common in countries where the status of foreign organisations is tenuous. This means that there are a number of individuals, carrying out mainly public sector duties in areas such as administration, research, education and so on, who would not normally have such a status in countries with more independent civil sectors and it may be the only time in their lives that they have diplomatic status.

There are an estimated 4,500 foreign companies from over 100 countries “doing business in Cuba”, mainly in the import sector, food production and the tourist industry and mainly from Europe and Latin America and Canada (ONEI, 2012). Business sojourners tend to stay a much longer period than diplomats, maybe up to ten years or more and some indefinitely through marriage. There is no real economic migration to Cuba and no recognised immigrant minorities, although a number of students attend university in Cuba from a range of developing nations. There are over 3,000 foreign students from 23 nations in Cuba, mainly coming from politically friendly third world African, Asian or South American countries, such as Namibia, Angola, Venezuela or Pakistan, or from émigré families and most study medicine, for which Cuba has a leading reputation worldwide (British Medical Journal, 3 July 2004). Most students tend to be housed in student accommodation and have little to do with sojourners who were in Cuba on official business, although some become involved in school or social life through specific contacts.

As the research project was an ethnographic study, I did not limit my focus of enquiry to specific research questions from the outset until I knew more about daily life for expatriates in Cuba and I envisaged that the data would influence the research focus fairly early on. From the outset, however, the challenges of adjusting to Cuba were tangible and from very early on in my stay in Cuba, it was apparent to me that sojourners struggled to adjust to daily living conditions and frequently outlined the kind of problems they were experiencing and, indeed, that we were experiencing as a family, as well.

I organised my observations and the comments I received thematically and I was able to identify relevant aspects of theory from the literature review and to focus on

specific areas for investigation. This process is described in detail in Chapter 4, dedicated to methodology. From this, I devised the following research questions:

1. What aspects of adjusting to a new environment do expatriates identify as the most challenging on international assignment?
2. How do they deal with the challenges they face?
3. How can international organisations help to prepare employees and their families for an international assignment?

This research project, then, focuses on the adjustment process of sojourners who had official visas to reside and work or study in Cuba, and includes mainly sojourners on official or diplomatic postings, business sojourners and journalists. It examines how they adjusted to life in Havana throughout the duration of their stay and their experiences and responses to daily life are analysed in Chapter 5.

1.3 The nature of the context

Much of the recent research carried out by external researchers in Cuba points to some degree of limitation and difficulty in terms of research sensitivity (Lee, 1993) and Cuba has been described as a “forbidden research terrain” (Fuller 1988) and a “politically sensitive location” (Bell, 2013), which has led some researchers to adapt their research approach towards a covert, qualitative approach in order to protect the independence of the researcher and the identity of the participants (Hirschfield, 2007; Wilson 2011). In this sense, both the sensitivity of Cuba as a research location and my role there in an official capacity had considerable bearing on how I approached the research project. The types of difficulties and restrictions that researchers have faced in Cuba and the types of strategies that they have had to adopt in order to obtain data influenced my decision to take a covert role as researcher. Carrying out sustained, overt research in Cuba without official permission would have been highly scrutinised and possibly sanctioned, on the grounds that I was on location for an official purpose and could be seen to be violating the terms and conditions of my visa. I felt bound to be sensitive towards the demands of my hosts and my employer and I judged that I could carry out a unique and interesting study, beyond the confines of my professional duties, but which would also enhance the understanding of the adjustment of international sojourners in a highly sensitive and particular context such as Cuba. In this sense, my study is not about Cuba, nor about the

Cuban regime, and my comments and conclusions should be seen as impartial in regard to any judgements about the nature of the setting or the social actors within it. I am interested solely in how such a context can impinge upon the process of sojourners on international assignment. The challenges that I faced, both physical and ethical, and the approach that I took are all discussed in detail in Chapter 4: Methodology.

1.4 The importance of sociological imagination

The proximity of my role as researcher to the research setting brings into view the importance of the ability to use “sociological imagination” (Mills, 1959) and the need to “think myself away” (Giddens, 2009, p. 6) from the context and daily routines of my experience in order to interpret what I considered important in the research. Cuba catches the imagination and curiosity of the world and its insularity, because of the degree of state censorship (Amnesty International 2010, p.4; *El País*, 2011, September 5), creates an enigma and multiple perspectives on what daily life is like. For this reason, In Chapter 2, I explore the research context in full, describing modern day Cuba and the recent historical background and international trajectory that has made it such a unique context to live in. To be “imaginatively aware” (Mills, 1959), it is important to address three sorts of questions, which will explain the positioning of a particular social context in relation to the development of humanity as a whole. For example,

1. What is the structure of this particular society as a whole? What are its essential components and how are they related to one another?
2. Where does this society stand in human history? What are the mechanics by which it is changing? ...
3. What varieties of men and women now prevail in this society and this period? And what varieties are coming to prevail? In what ways are they selected and formed, liberated and repressed, made sensitive and blunted?

(Mills, 1959, p.5)

Throughout the thesis I seek to address the type of questions that sociological imagination requires, transcending the “troubles” of “immediate relations” (ibid, p. 8) in everyday life, in order to explore the “issues” that “form the larger structure of social and historical life” (ibid) as part of my ethnography .

Key to ethnography is the understanding of behaviour “within the context” (Bryman, 2008, p. 403) and I examine this from a multidimensional perspective, which includes the role that different discourses or worldviews play in interpreting daily life in such an insular location. In doing this, I have felt the need to go beyond the academic literature on Cuba, which has tended to be positioned “between enthusiastic sympathy on the one hand and a rejection based on a priori positions about ‘Communism’ or disenchantment on the other” (Kapcia, 2008, p. 628), and to draw upon resident journalistic sources and the wider “blogosphere”, both within and outside Cuba, in order to give a richer and more balanced view of daily life.

In Chapter 3, I look at key concepts used in the study and review recent and relevant research literature in order to inform my analysis. In Chapter 4, I present the methodological approach that I took and the reasons for this. I also explain my role as participant observer and deal with reflexivity, in which I outline my own assumptions and preconceptions, and how these might have influenced my research. In Chapter 5, I present my data and analysis and, in Chapter 6, I discuss the key findings of the project. In Chapter 7, I draw together the main conclusions of the project and look at the implications for research and international organisations who have to deal with relocation. I also include a final note on the future of Cuba and how I see it evolving as a destination for relocation and daily life as a result of the recent reform process and international rapprochement.

Chapter 2. Research Context

2.1. Introduction

Sociological imagination requires the researcher to embrace different perspectives and to thoroughly explore daily life from different viewpoints in order to see the relationship between individual experiences and the larger society and where a particular society stands in history (Mills, 1959). In this sense,

The sociological imagination...is the capacity to shift from one perspective to another – from the political to the psychological; from examination of a single family to comparative assessment of the national budgets of the world; from the theological school to the military establishment; from considerations of an oil industry to studies of contemporary poetry. It is the capacity to range from the most impersonal and remote transformations to the most intimate features of the human self – and to see the relations between the two.

(Mills, 1959, p.6)

In this sense, using sociological imagination is making the connection between “the personal troubles of milieu” and “the public issues of social structure” (ibid), in that the day to day personal experience of such issues as employment, marriage, city life and so on can be influenced by “structural changes” and may be “incapable of personal solution”(ibid, p.7). Thus, in order to understand the challenges of such daily experiences “we are required to look beyond them” (ibid).

For this reason, it is important to build a deep understanding of the research context, and this chapter explores modern day Cuba from a number of different perspectives. I seek to describe and interpret the particular “dimensions” of context (Duranti and Goodwin, 1992), including aspects of both the physical environment and the behavioural environment, as well as the “larger social processes” as part of the “extrasituational context”, which extends beyond the “immediate setting” (Duranti and Goodwin, 1992, p. 8) and which relates to shared history, values or beliefs and which embraces everyday discourse and the social experience of the participants within it. This an essential part of ethnography and key to understanding the meaning of actions and events of everyday life in a given situation (Blommaert and Jie, 2010). Cuba is a distinctive context for an international assignment relocation, in that it is a politically sensitive location (Bell, 2013), internationally cloistered and largely

shielded from independent outside scrutiny (BBC, 2007, September 1; El País, 2011, September 5), all of which places unusual demands on the adjustment process, as we shall see in Chapter 5. The complexity of the Cuban context requires that attention is given to a range of discourses that surround the everyday context in order to obtain a balanced and inclusive perspective on everyday life. For this reason, in this chapter I outline aspects of Cuba's current socio-political and economic system and then explore the background to the geo-political and historical influences that have shaped the current perspectives which seek to explain Cuban actuality and support particular world views or "Discourses" (Gee, 1990), whether "dominant" or "demotic" (Baumann 1996), endogenous or exogenous in relation to the context. This is key to my use of sociological imagination in order to explain how I interpret sojourners' construction of their sojourn in order to contextualise the presentation and analysis of sojourner accounts in Chapter 5 and the discussion of the model of culture shock in Chapter 6.

2.2 "Coming out" as researcher

As I pointed out at the beginning of Chapter 1, I was not on location in Cuba primarily as a researcher and my immersion in the research setting created a number of challenges in conducting the research. For this reason, I first intend to explain my own personal and professional narrative in order to "examine the impact of the position, perspective, and presence of the researcher" (Finlay, 2002, p. 532), because, as Holliday (2007) notes, explaining "past experience can often help to give greater insight and a fresh perspective to the data" (Holliday, 2007. P. 132). In this sense, I will explain what "conceptual" and "cultural and ideological baggage" I brought to the setting (Holliday, 2007, p. 167) and "come out" as researcher and assert my "agenda" (ibid p.124-5) in order to throw light upon my use of sociological imagination in explaining the context and the data and the underlying assumptions and perspective that my research project is based on. Through a process of "reflexivity" (Gouldner, 1970) I will outline my situation and assumptions and preconceptions, and how these influenced my research.

2.3 Personal narrative

In approaching this research project on adjustment of international sojourners, my past experience or "personal narrative" (Holliday, 2007, p.132) has particular relevance because it is born largely from the fact that I am, myself, an international

expatriate and I move from country to country every three years or so. I chose to accept the posting in Cuba mainly because I was interested in returning to Latin America after a short break in Europe. I and my family have wide experience of Latin America, we speak fluent Spanish and Portuguese and we were eager to return to what for us, we thought, would be a fairly familiar environment. My professional background and experience of moving from country to country, often in countries with experience of recent conflict between sections of the population, such as in Latin America or the Balkans, led me to always try to be impartial and see issues from various angles and to resist being swayed by the arguments of one faction or another. As an outsider, I was continually lobbied to take sides, but positioned myself as an objective observer as much as possible. In the case of Cuba, however, the polarisation of views is particularly acute, in that any visit to Cuba, whether as a tourist or professionally, brings a person into contact with symbolic images and influences, emanating from the island's revolutionary legacy and the dominant discourse of revolutionary achievement, as described in 2.4.

My perspective on Cuba before arriving was drawn mainly from my general knowledge of the history of Spanish colonialism and my experience of South American languages, literature and music, although I read more specifically about the context once I knew I was being posted there. Previously, in my reading of South American literature, I had come across the work of the eminent Cuban writer, Alejo Carpentier, largely considered the creator of "magical realism", born from his concept of "*lo real maravilloso*" or "magical reality", the iconic style of much of South America's twentieth century literature, which has as its setting, in my view, a wonderful and magical continent. I was also a fairly accomplished amateur musician and had an interest in the sounds and rhythms of Latin American music, such as salsa and rumba dance music, the melodic cadences of the internationally famous *Buena Vista Social Club* and the Cuban folk tunes of Eliades Ochoa and others, or the more modern dance hybrids of "*reguetón*", "*cubatón*" and Afro-Cuban jazz. However, while I was aware of the recent history of Cuba and its much lauded socialist revolution, I had no particular sympathy for the ideology or idealism that, I believed, underpinned modern Cuban society. In fact, it would be fair to say that my initial view was one of scepticism and suspicion towards the exoticised international image of Cuba presented in the "literature of enthusiasm" (Wilson, 2011, p. 1) about Cuba, which seeks to "portray Cuban people as the satisfied beneficiaries of a

perfectly just society” (ibid), more because of my mistrust of manifest political ideology in general as a basis for a system of government, than any personal antagonism towards the particular ideology of the Cuban regime. On the other hand, I had also witnessed the inequality and social exclusion of large swathes of indigenous populations and lower social classes in the Andean countries of Latin America, and I was curious to discover how the Cuban regime had dealt with poverty and inequality on a systemic level and interested to see at first hand the alleged achievements of the revolution, which was renowned for its world-class systems of education and health care for all (Zabala-Argüelles, 2010). However, I was also aware of the well-documented comparison between Orwell’s *Animal Farm* and the alleged corruption of Cuba’s post–revolutionary society and objections to its human rights record, represented in the international press and observer reports outlined in 2.3, and I learned fairly early on in my stay that Orwell’s book was in fact a prohibited text in Cuba. In short, I moved to Cuba with what I hoped was a fairly open mind, albeit with a feeling of scepticism and realism, but no antagonism, about expecting to engage with a utopian society. More pointedly, I was eager to learn more about life in Cuba and how people had experienced the revolution. In the terminology of Bauman (1996), I was more interested in the exploring the “demotic” discourse embedded within social life, rather than the “dominant” discourse of the Cuban regime, and I was full of expectation about whether I would discover Carpentier’s “magical” Cuba.

In the event, what I discovered was a special place full of wonderful characters, living a unique historical experience, although somewhat distorted by economic penury. I also witnessed poverty, inequality and repression amongst the local population and, amongst the sojourner community, segregation, monitoring and arrests, which inevitably influenced my experience of daily life on the island. From the outset, I was surprised to see how politicised local life was and how personal power and authority influenced access to the basics of life, both for Cubans and sojourners. Even from just my initial contact with life in Cuba, the context seemed to me that it could be particularly challenging for sojourners opting for this location as an assignment, in comparison to others that I had experienced, mainly because of the shortage of basic goods and services and the overall sense of social control. Sojourners regularly talked to me of acute “culture shock” on arrival, which I decided to investigate and

explore the reasons for. The result is this study, in which I seek to examine what challenges sojourners described and how they overcame them.

In terms of what I went to Cuba to do, I was on location in Havana as an official representative of my country with diplomatic status and I was able to have fairly free access to a wide variety of social settings, and possibly more access to official settings than business sojourners, for example, in order to observe daily life. Because of my official role, I was allocated a specific villa, old and dilapidated, but quaint and characteristic, as a family home by the Cuban authorities, near to other foreign residents, but also to some Cuban state officials. We inherited several local domestic helpers, who we paid directly ourselves, and had our two children in one of the international schools in Havana. My professional function gave me access to meetings with the authorities and access to a wide range of receptions, dinners and other social events to meet and talk to, sojourners, many of whom were diplomats, and Cuban officials, while my social and family life gave me the opportunity to meet a wide variety of families on international assignment, most of whom were not diplomats, but long-term sojourners doing business in Cuba. In this sense, I was immersed as a participant in the life of sojourners and this was a major influence on how I carried out my research.

2.4 Cuba today

2.4.1 Introduction

There are two key events in the recent history of Cuba, which have had a profound influence on life on the island and, in one way or another, can be cited as the origin of most major socio-political milestones occurring in the past 50 years. It is important to have some knowledge of these events in order to explain the way Cuba is today and the challenges or “troubles” (Mills, 1959) that people face. The first was the revolution in 1959 and the subsequent political and socio-economic changes that ensued from it. The second was the collapse of the Soviet Union in 1991, which severed an annual estimate of \$4-5 billion of economic aid to Cuba (Spadoni, 2004), used to sustain the many achievements of the revolution. This gave rise to *El Período Especial* (“The Special Period”), which was an extended period of economic crisis and penury in the 1990s, triggered by the collapse of the Soviet Union and which left the island lacking substantial external financial support. This resulted in what has been described as a “famine” throughout the decade of the 1990s, causing

profound “negative physical, mental and social consequences” on the Cuban people (*Canadian Medical Association Journal*, 2008), described in detail in an ethnography of the Special Period by Wilson (2011). In this she makes a reference to a study by Brenner (2007), who describes a fairly typical Cuban experience of this period as “. . . you had to substitute sugar water for food every third day for a year, and as a result you lost your eyesight because of a vitamin deficiency (as happened to fifty thousand Cubans temporarily), and lost twenty to twenty-five pounds (the average for Cubans in 1993-1994)” (ibid, p.1).

Likewise, these two periods gave rise to two responses that have also had a profound influence on the nature and quality of life in Cuba throughout the past 50 years. The first was the imposition of an economic embargo on Cuba by the Organisation of American States in 1962, led and extended by the United States to this day and which is frequently mentioned in everyday discourse, as we shall see below in 2.5. The second response was the reaction by the Cuban government to the Special Period, which saw the introduction of currency changes and the decision to expand international tourism to the island in order to access foreign currency, as described in 2.4.4. It is important to understand how both of these responses have contributed to scarcity and inequality in everyday life, creating a deeply divisive informal economy and a political elite, which, from some points of view, has corrupted the original principles of the revolution (*Socialist Review*, 2011).

This section briefly outlines the political and socio-economic data, systems and institutions that underpin Cuban society and government as a background to a more thorough look at the everyday context that sojourners experience and have to adapt to. It is important to give an overview of the essential components in the structure of society and how they are related to each other in order to inform the use of sociological imagination (Mills, 2007, p. 7).

2.4.2 Cuba and its population

Cuba is the largest island in the Caribbean, Spanish speaking because of its colonial past, with a harsh and often tumultuous tropical climate, including seasonal hurricanes and tropical storms. The national census in 2012 showed the population of Cuba to be 11.25 million, 8.5 million (75%) of which live in urban areas with an even distribution amongst men and women. 65% of the population is classified as

“white”, 24% of mixed race (“mulatto”/“mestizo”), 10% “black” and 1% Asian. Just over 70% of the population is between the ages of 15 and 64 year-old segment and the median age of the population is 39.5. According to the World Health organisation, average life expectancy in Cuba is 79 years of age, ranked 34th worldwide and level with the United States (World Health Organization, 2015). The population of Havana, the capital city, where most sojourners live and the scene of most observations and research for this project, is 2.1 million. The second city, in the east of the island close to Jamaica and Guantanamo Bay and the starting point of the Cuban Revolution, is Santiago de Cuba, with a population of just over 1 million (ONEI, 2012).



Figure 2.1 Map of Cuba

In relation to other islands in the Caribbean, Cuba is much larger and more populous and dominates the seascape. The map in Figure 2.1 (available at <http://www.mapsofworld.com/cuba/>) shows Cuba’s proximity to the United States, which is less than 100 miles from Cuba, and the largest English speaking island, Jamaica, with a population of less than 3 million.

2.4.3 The Cuban political system

In a “politically sensitive environment” (Bell 2013), it is important to have some knowledge of the political system in operation in order to contextualise social behaviour and better understand what sojourners had to adjust to. This section provides a brief introduction to this.

In its constitution, Cuba describes itself as:

... an independent and sovereign socialist state of workers, organized with all and for the good of all as a united and democratic republic, for the enjoyment of political freedom, social justice, individual and collective well-being and human solidarity system.

(Cubanet, 1992, Article 1)

The constitution goes on to describe all the guarantees and rights that individuals have as a result of the revolution and, to this day, the protection of the revolution is at the heart of government policy and its recent concerns about the need for reform to protect the successes of the revolution (BBC, 2011, April 16).

As a consequence of the Cuban revolution of 1959, led by Fidel Castro, which displaced the dictatorship of Fulgencio Batista, it has been government policy in Cuba to operate a single party state and that one party, *El Partido Comunista de Cuba* (The Cuban Communist Party), has a monopoly on all political, social and economic activity on the island. The *Politburo* is the governing body of the party and the supreme authority of the Cuban revolution and state machinery. Through this body all control of formal education, institutions of social organisation and media channels, such as the state-run newspaper *Granma*, is centralised. This institution is accompanied by a parallel organisation for young people called *El Unión de Jóvenes Comunistas* (Communist Youth Union), whose “main duty” is “promoting the active participation of young people in the tasks of building socialism” (Cubanet 1992, Chapter 1, Article 6) and which organises events and programmes for young people and produces the state-run newspaper for young people, *Juventud Rebelde* (“Rebellious Youth”). On a day to day basis, this structure means that most aspects of social organisation are centralised and monitored through the political system and the Communist Party, with almost seamless identification between the state and the

government, characterised by “a severe blurring of the boundaries between the Party and any other institution of authority” (Bengelsdorf, 1994, p. 105).

Over the past five to ten years, Fidel Castro has gradually handed over power to his brother, Raúl Castro, a former Minister of Defence and a companion in the revolution of 1959, who has initiated a reform process within Cuba (*The Guardian*, 2008, February 20). Since the changeover there has been an increasing militarisation of the regime, with generals being appointed to leading positions in the country’s state companies, partly, it is claimed by the government, to improve the efficiency of the companies and tackle corruption, but also, as many observers note, to move ideology onto a more pragmatic level in the face of economic necessity (Cubaencuentro, 2010, September 28). There is much public and private debate in Cuban society about these changes, which propose a modernisation of the socialist model with more free enterprise, although there is also an underlying cynicism about the changing nature of political control and how it is being consolidated in the hands of a few (Ravsberg, 2010, August 5). In this sense, as we shall see, it could be said that Cuba is now in a post-revolutionary era, with a consolidated political elite controlling most aspects of daily life. The reform process is analysed in 2.4.8.

Elections are held regularly in Cuba, but there is only one party and candidates are chosen through *Comisiones de Candidatura* (“Candidate Nomination Commissions”), administered through local municipal authorities and organisations linked to the state, such as trade unions and the official women’s movement (Ravsberg, 2011, December 15). The Cuban government classifies Cuban elections as “the most democratic in the world, because money cannot buy votes and delegates are chosen at a neighbourhood level”, but the absence of a free press or any non-state organisations or structures attracts international criticism and scepticism (BBC, 2008, January 28).

2.4.4 The economy

The present day Cuban economy has a deep impact on daily life and, consequently, sojourner adjustment, because of its continued dependence on international assistance and the way the Cuban government seeks to preserve its economic and social model along revolutionary principles (*The Economist*, 2013, July 20). Some

basic knowledge of how the economy operates in Cuba and the impact that it has is important to an understanding of the research context.

Cuba operates a centrally planned economy organised through state-run monopolies, which are administered by government ministries. The state owns all the means of production, but enters into partnership with foreign companies, who carry out production using Cuban state employees while maintaining 51% of the ownership, (Cubamet, 1992, Chapter 1, Article 15). The private sector is limited by policy to self-employed individuals only, who operate on a small scale with limited access to investment funds and in the absence of a wholesale sector with supplies being controlled by the state (*The Economist*, 2012, March 24b). Economic life has been dominated over the past 50 years by the exercise of an economic embargo by the United States, originally in protest by the US government against a series of nationalisations of US interests by the Cuban regime in the 1960s, maintained subsequently by a strong anti-Castro lobby. Some countries, however, such as Canada and Mexico have never participated in this embargo. More detail on how this embargo and the planned economy impact on daily life and sojourners is outlined in 2.4.6.

The current state of the Cuban economy is extremely weak (*The Economist*, 2013, July 20) and it has rarely stood on its own without the dominance and support of an outside benefactor. Colonialism under the Spanish was replaced first by the regional imperialism of the United States and then by Soviet communism. Cuba's most difficult economic period, the previously mentioned, *El Período Especial* ("The Special Period"), in the 1990s, in which substantial financial support from the Soviet Union suddenly ceased, left the island in crisis and this provoked the country's first flirtation with mass tourism and a modest liberalisation of the communist business model (Domínguez-García, 1997). However, obtaining subsequent partial benefactors, such as China and Venezuela, allowed the government to halt the trend towards a more open international perspective and retain its original insularity and political control (BBC, 2015).

Currently, the Cuban economy depends heavily on the exportation of nickel and on tourism, both of which fluctuate, while it imports 80% of the food consumed on the island (*El País*, 2011, April 14). The economy has been buoyed by the support of

Venezuela's controversial leader Hugo Chávez and his successor after his death, mainly through the *Oil-for-Doctors* programme, which supplies Cuba with 50% of its oil needs at greatly reduced prices in exchange for a programme of Cuba's highly rated medical expertise (BBC, 2003, November 13).

Cuba can be described as "a unique market" with "significant challenges" for doing business (UK Trade and Investment, 2014, section 2), such as very slow decision making, heavy regulation, delays in payments and the need to give generous credit terms, as well as obstacles in doing business due to the US embargo of Cuba. Likewise, *The Economist Intelligence Unit* ranks Cuba number 80 out of 82 most difficult countries to do business with (The Economist Intelligence Unit, 2015), while *The Heritage Foundation* ranks the country 177 out of 178 in terms of "economic freedom", making it one of the world's least free economies with state price controls and monitoring of investment dominating and distorting economic activity (The Heritage Foundation, 2015).

However, despite obstacles there are a range of opportunities, particularly in export trade of basic goods, tourism and mining (Brundenius, 2002, p. 374), as well as some large infrastructure projects and the chance to work in specialised research (UK Trade and Investment, 2014, sections 3-6). Cuba's workforce is considered "highly skilled", for example, and the move towards privatisation is seen as positive, although the island's "dilapidated infrastructure" and restrictions imposed by US sanctions remain a hindrance (The Economist Intelligence Unit, 2015). It is also considered that the reforms to cut government payrolls and expand approved professions "have not been broad enough to ensure any meaningful advancement in overall economic freedom" (The Heritage Foundation, 2015).

Day to day economic life is dominated by the operation of two currencies - the *moneda nacional* (national currency), often referred to as the "soft peso", or "CUP", and the *peso convertible* (convertible peso), often known as the "hard peso" or "CUC". 1 CUC is equivalent to around 25 CUP, which is equivalent to just over a US dollar, though the rate of exchange is determined by the authorities and can be subject to sudden and substantial devaluations (*The Economist*, 2012, March 24a) The Economist, 2012, March 24a). The CUC is directed at paying for imported goods and services and is pegged to the US dollar. It is illegal for Cubans to earn in CUC,

but since 2009, they have been allowed to receive money transfers from relatives living outside Cuba and to buy goods and services in Cuba with the currency (ibid).

Most Cubans benefit from being able to work and develop professionally through educational opportunities, though salaries remain low. All workers are state employees and earn an average of \$20 USD a month, even highly qualified professionals, such as doctors or university professors, although this is supplemented by the provision of free health and education and other state services (BBC, 2008, June 12). Employment makes little difference to the standard of living, as subsidies are available to all Cubans, although it is envisaged that these will eventually disappear as a controlled market economy develops (ibid). In the meantime, some work is available with foreign companies, with embassies or in the tourist industry, which gives Cubans access to the convertible currency and allows for a better standard of living, although employment of this sort can be precarious with little legal protection and often subject to the whim of a powerful individual or bureaucratic procedures (Ravsberg, 2011, April, 14).

The use of two currencies and the expansion of tourism and international business has engendered a dual economy and has created inequality in society, as CUCs are required to buy most things other than locally grown agricultural goods, and feeds a growing informal economy of goods and services (*The Economist*, 2013, October 23). The two “economies” are largely kept separate through different retail outlets with different pricing mechanisms, though there is growing eagerness amongst Cubans for the CUC in order to supplement the ever dwindling basics provided by the state (BBC, 2005, April 22). As sojourners bring foreign currency into Cuba in the form of their salaries, they are a direct target group for the informal economy and the consequences of this for sociocultural adjustment is described in more detail in sojourner accounts in Chapter 5.

2.4.5 Social background

This section explores some aspects of the daily life in Cuba and how it is organised socially and institutionally as a consequence of the revolution. This is important background in order to understand the interface between the local context and sojourner life and adjustment.

All services such as health and education are free for all citizens and everyone receives basic food rations through the *libreta* (ration book) each month and services such as energy provision and landline communications are subsidised. The processes of socialisation are fairly common to all citizens in Cuba, as all institutions are state controlled and there is no substantial private sector, and the concept of equality and the notion of the collective good are central principles of the revolution embodied within a whole chapter of the constitution, although individual excellence is encouraged (Cubanet, 1992, Chapter VI). The regime has strived to provide the basics of life for all, attempting to avoid the accumulation of personal wealth. However, while this is a central principle, there is some doubt as to the equal treatment on racial grounds (Cubaencuentro, 2006, October 11) and on sexual grounds (Cubaencuentro, 2010, September 1).

The achievements of the Cuban Education system are well documented in global statistics, with students performing significantly better in terms of educational achievement than in most other countries in the Caribbean and Central and South America (UNESCO, 2015). Statistics such as 100% rates of literacy in its under 25 year olds, together with top indicators in gender equality and the universal provision of high quality education from early childhood to postgraduate, are striking achievements in a developing country. However, it is also reported that, more recently, it has been weakened by the crumbling infrastructure of schools due to lack of resources that have plagued the country since the collapse of the Soviet Union and the increasing exodus of educated people from Cuba and to the tourist industry where they can earn in foreign currency (The Independent, 2010, November 7).

Likewise, the Cuban Health system has been described as rivalling most Western countries (Journeyman Pictures, 2007, July 25), with lower infant mortality rates and better life expectancy than the United States and Europe (World Health Organisation, 2015; UNICEF 2015). In recent years, however, the health system has suffered due to lack of resources and access to foreign currency, which, from the point of view of some commentators, has led to inequality in access to care (Hirschfeld, 2007).

Cuba has become a major knowledge exporter, particularly in the areas of medicine, education and state and military intelligence. There are an estimated 50,000 expatriate Cubans working overseas on official projects in health and education set

up by the Cuban government with other countries, bringing in around 6 million USD annually, which exceeds even the tourist sector as the leading export industry (BBC, 2006, January 17; AFP, 2010, December 10). Also, Cuba has now begun to offer health tourism or “medical diplomacy” for foreign visitors (BBC, 2009, May 20), using the low cost expertise of its own medical professionals and its specialised medical facilities, which have the dual function of building Cuba’s international reputation and generating some necessary foreign currency for economic solvency.

After the revolution, most people were allowed to stay in the houses they lived in and others were allocated from those that fled, but much of the infrastructure in Cuba largely dates from before the revolution and is poorly maintained (Ravsberg, 2010, June 3). This results in a chronic shortage of housing and most live in cramped conditions with family members across several generations amidst crumbling architecture (*Overlander TV*, 2013, May 15). Public transport is very poor quality and unreliable and the lack of mobility across the island restricts movement and makes it more difficult to resolve the problems created by scarcity (Ravsberg, 2011, September 29). Resources for daily life are extremely scarce and many everyday items, such as basic foodstuffs, office stationery and school supplies are in very limited supply and require considerable effort to get hold of (BBC, 2014, August 16). Supply is inconsistent and it is not uncommon to see empty shelves standing beside shelves full of a single product that no one wants to buy (*ibid*). Other sources of difficulty in daily life are the frequent power cuts and water shortages, which can create considerable discomfort in a tropical climate (BBC, 2008, September 8). The heat is intensified with extremely high levels of humidity and fierce bouts of tropical rain often cause floods because of the poor infrastructure, while there is a high level of threat of seasonal hurricanes for much of the year (*ibid*).

In contrast, much renovation work has been done on the old centre of Havana, *La Habana Vieja*, funded by the tourist industry. This district was designated a UNESCO World Heritage site in 1982 and is still undergoing a continuous programme of restoration led by the city architect, Eusebio Leal, and funded by *La Oficina del Historiador de la Ciudad de La Habana* (“Office of the Havana City Historian”), which is allowed, by the regime, to invest the proceeds from tourism back into the ongoing restoration of the historical centre, depicted in Figure 2.2.



Figure 2.2 Old Havana

Old Havana, which is gradually being renovated to its original state by the city architect (photo provided by the author)

Old Havana is exotically described in a plethora of tourist sites trying to attract tourists to Cuba (Cuba Absolutely, 2014, November) and the transformational impact that tourism and “the tourist gaze” (Urry, 2002), explained in section 2.5.4.3 below, has had on the course of the revolution and on daily life is evident in sojourner accounts outlined in Chapter 5.

Religion plays relatively little part in the social life of Cubans, though it is respected by the constitution (Cubanet, 1992, Chapter 1, Article 8). The Catholic Church is tolerated by the authorities, but kept at a distance from power and influence. Relations with the Church have been slowly improving, as Cuba has responded to international pressure, which has culminated in several papal visits and the Church has been influential in securing the release of political prisoners by acting as an arbitrator directly with the Cuban state (BBC, 2010, May 20). There is also a local religion, called *Santería*, strongest in the East of the island, which has its roots amongst the original African slaves.

In the early days of the revolution, Fidel Castro championed the implementation of a system of organisation and control to support the formal authority of the Communist Party. He set up a system of “neighbourhood watch” through a network of *Comités de Defensa de la Revolución* (“Committees for the Defence of the Revolution”), known as CDR to be “*los ojos y oídos de la revolución*” (“the eyes and ears of the revolution”) (Sánchez, 2010, September 27). This is an infrastructure of eight and a half million people with the official function of reporting on “counter-revolutionary” activity under the slogan of “*¡En cada barrio, Revolución!*” (“In every neighbourhood, Revolution!”) (ibid). The work of the CDR is supported by a strong police presence, who are numerous, armed and persistent in checking documentation in the streets, and who occupy a privileged position, being paid more than twice as much as other public servants in order to ensure commitment and enforce order (*Journeyman Pictures*, 2007, August 30).

The CDR have important social and community responsibilities, such as arranging festivals, co-ordinating government projects, like vaccination programmes, blood banks, recycling, practising evacuations for hurricanes, fighting the government’s anti-corruption campaign, and so on (Sánchez, 2010). However, these are state initiatives and the CDR are considered by many as a key part of monitoring individuals’ activities on the ground, enabling the state to “obtain information on the daily activities of every person in Cuba” and of ensuring the success of the revolution (Aguirre, 2002, p. 92). It is important be aware of the social landscape of local life in Cuba and, in particular, the profound impact that recent history has had on everyday living, in order to contribute to understanding the modern day context and the adjustment of sojourners to it. Cuba’s international reputation, its state institutions, its approach to the social organisation of its population are all factors that contribute to a particular way of life that engage sojourners in their adjustment.

2.4.6 Communications and media in Cuba

The contact ordinary Cubans have with the outside world is still very limited (Amnesty International, 2010). Press and media are controlled by the state and no international media or publications are sold on the island (Voeux and Pain, 2008). The internet is officially banned for ordinary citizens and only available with permission to academics and public employees through a tightly monitored country-wide intranet with a firewall

(ibid). Internet access is currently around 3% (*El País*, 2011, February 10; *The Economist*, 2011, March 3) and mobile phone use very expensive, although usage is increasing (Reuters, 2012, June 15). Foreign residents can apply to use the internet, but it is an expensive, technologically outdated dial-up system, largely inadequate for modern day internet traffic (Voeux and Pain, 2008). Furthermore, the import of satellite equipment is illegal, although cable television is provided in tourist hotels and diplomats can also apply for a license for this (ibid).

Despite media restrictions, there are a number of resident foreign correspondents in Cuba that report on local politics for the international press. The sensitive nature of their reporting places them in a precarious position in having to produce reliable coverage, which, at the same time, can be monitored and censored by the Cuban authorities (Ravsberg, 2011, February 3). The arrest and expulsion of foreign correspondents sometimes occurs, as a result. In September, 2011, for example, Mauricio Vicent, the resident foreign correspondent of the Spanish newspaper *El País*, was expelled by Cuban authorities for giving a "biased and negative image" of Cuba (*EL País*, 2011, September 5). This followed the arrest, sentencing and eventual expulsion of another Spanish journalist, who had returned to Cuba for an undercover report on child prostitution in Cuba in 2008 for *Telecinco* in Madrid, on the grounds outlined by the Cuban authorities that he had described offences that he himself was involved in (Knight Center, 2011, August 11). Earlier, in 2007, the Committee to Protect Journalists expressed concern for the expulsion of correspondents from the *Chicago Tribune*, the BBC and *El Universal* from México, because their way of reporting on the Cuban situation was "not convenient" for the Cuban government (Committee to Protect Journalists, 2007, February 23; BBC, 2007, September 1). In this sense, foreign journalists are seen by some commentators as being intimidated by the authorities through monitoring and reprimand in order to be able to protect Cuba's external image (Ravsberg, 2011, February, 3).

It is important to understand the degree of isolation that people living in Cuba experience, through the lack of access to outside media and communications, in order to grasp a sense of the challenges involved in sojourner adjustment. Likewise, it is also important to try to capture the role that social control plays in creating a sense of vulnerability and uncertainty, particularly for the local population and longer

term sojourners presented in this study. This is a key part of using sociological imagination, which can serve to trace the source of specific experiences, or “troubles”, in the wider social context and “issues” (Mills, 1959). In Chapter 5, I present a number of cases that explore these challenges quite explicitly in how they construct their experience of adjusting to Cuba.

2.4.7 “El Bloqueo”: Cuba’s never ending story

Deep in the psyche of modern day Cuba is the conviction that *el bloqueo* (“the blockade”), which the US embargo of Cuba is known as in Cuba, is the root cause of Cuba’s economic problems (Ravsberg, 2010, August 26). The embargo is an everyday topic of conversation and is frequently cited in the official media to explain shortages and hardship (see Appendix A). However, there is some argument as to its effectiveness (The Economist, 2008, August 14) and an alternative view is that it is in the interest of the Cuban regime to sustain the belief that the US embargo is the root cause of everyday misery and that scarcity actually enables it to retain social control, as in,

By getting rid of the Embargo, the Castro Regime will lose its excuse for economic underperformance and its anti-imperialist rhetoric will be greatly undermined.

(Brito, 2014)

The embargo has been relaxed in recent years through special measures, such as the decision to increase food exports to Cuba in 2001, as a result of Hurricane Michelle, and President Obama’s decision to relax travel restrictions of US citizens with family in Cuba in 2011 and for “cultural” exchanges, as well as allowing the sending of remittances and gifts to Cuba taking steps to open up telecommunications with the island (*The Economist*, 2011, February 16). Very recently the US and Cuba have announced a “normalisation” of their diplomatic relations, with the hope of an end to the embargo looking likely (Reuters, 2015, July 1; BBC, 2014, December 18). Amongst certain commentators, there is also scepticism over the substance of the initiative, as any significant opening up of Cuba would undoubtedly create a greater scrutiny of internal Cuban affairs. For this reason, there is a call for some key demands to be met in the process, as outlined below by the renowned Cuban blogger, Yoanni Sánchez.

First is the immediate release of political prisoners...Second is the ratification of United Nations human rights covenants. Third is the dismantling of the apparatus of repression: shameful assaults on so-called counterrevolutionaries, arbitrary arrests, demonization and intimidation of those who think differently and police surveillance of activists. Finally, the Cuban government must accept the existence of civic structures that have the right to express opinions, decide, question and choose — voices that have not been represented in the current negotiations between the governments of Cuba and the United States. The road map drawn by the higher-ups has been hidden from us.

(Sánchez, 2014, December 18)

The embargo is a key concept in understanding modern day Cuba and the nature of daily life on the island. It is embedded within daily discourse at both formal and informal levels (Aguirre, 2002) and the perceptions and the discussion of its impact on the economy, together with the influence of both the wider geopolitical landscape and the particular local political structures on how it is dealt with and how it affects issues of scarcity and control, has a profound impact on the sojourner experience.

2.4.8 “La reforma”: Cuba’s new story

When Raúl Castro formally took over from his brother Fidel in 2008, because of ill health, he publicly declared war on what he describes as the “enemy from within”, making reference to corruption and the erosion of the revolutionary model (BBC, 2015, March 13). Raúl has made frequent public announcements condemning the current state of Cuban society, declaring that that the Cuban economic model is no longer sustainable and that radical change is both needed and being planned (BBC, 2010, September 14). With this, Cuba announced the end of the *libreta*, or rationing regime, the expansion of private enterprise amongst Cubans, increased foreign investment and the relaxation of strict controls in agriculture and industry. However, to date, for some observers reform has focused only on small adjustments to economic life, which have had little impact on the current political model and, for some commentators, serves to preserve the status quo (Ravsberg, 2010, August 5; *The Economist*, 2012, March 12).

The idea that individuals will be able to enhance their own personal wealth through entrepreneurship, for example, is frowned upon by the Cuban government and, consequently, the reform process is “weighed down by an old model that keeps

entrepreneurs on a tight leash and says: You can start a business, but I can take it away from you at any time” (*Business Insider*, 2012, September 4). Furthermore, Raúl Castro has been careful to stress that change will be state led and strictly controlled to preserve the “successes of the revolution” and preserve the current political system (*El Nuevo Herald*, 2010, December 10; BBC, 2014, December 20).

There are also a number of anomalies in the reform process. As a result of a recent reform in 2011, for example, Cubans are now allowed to buy and sell cars from each other. While the law was an important change for Cubans, the proper infrastructure has not been put in place and no new cars can be imported to satisfy demand. The result is astronomical prices for very limited supply, leading to offers such as “\$91,000 for a discontinued 206 economy car and a whopping \$262,000 for a new 508 family sedan” (*Business insider*, 2014, July 7). Such examples create frustration and cynicism around the reform process (Ravsberg, 2010, August 5).

The debate on the “*reforma*” in Cuba has a profound impact on sojourner life because it contributes to the ongoing uncertainty in the business environment and deterioration in the quality of life through political and economic stagnation. As more Cubans are forced to seek employment outside the public sector, it is the informal economy that increasingly provides a living and dominates everyday interactions (Sánchez, 2010).

2.4.9 “The enemy within”

As well as introducing some economic reform, Raul Castro has declared corruption as one the principal enemies of the revolution and sees tackling it as a key part of revitalising Cuba's unproductive economy (BBC, 2011, May 5). Cuba scores fairly well on Transparency International’s “Corruption Perceptions Index” (63 out of 175), and fairs favourably with other countries nearby (Jamaica, 85; Mexico, 103, USA, 17). From a different angle, however, it is the day to day inefficiencies and corrupt practices that serves to fuel an embedded informal economy which is more of a problem in everyday life, rather than large scale corruption. According to one report, it is “the widespread petty (administrative) corruption that pervades Cuban society, mostly because of the nature of the economic system and the scarcity of goods and services it has created” (Transparency International, 2014). As one writer explains,

En América Latina, un solo corrupto puede robar 11 millones (de dólares) de un golpe. En Cuba, 11 millones roban un dólar cada día

(In Latin America, one corrupt person can steal 11 million (dollars) in one go. In Cuba, 11 million steal one dollar every day)

(Botín, 2009, p. 244)

The degree to which the corruption has been addressed is an area of contention, with many bloggers and reporters citing the intrinsic corrupt nature of a system that governs a situation of such scarcity and control and the endemic resistance to facilitate any change in daily practices by low and medium level officials. For example,

La burocracia continuará poniéndole zancadillas a los cambios porque es evidente que estos afectan sus intereses económicos y los privilegios que les permite el actual modelo.

Bureaucrats will continue to trip up the changes, because it is evident that they affect the economic interests and the privileges that are allowed to them by the current model.

(Ravsberg, 2011 February 24)

In this sense, according to Ravsborg, the acute shortage of goods and services available to people on a daily basis motivates them to seek solutions that are often illicit, because it is the only way to access an adequate standard of living. For some observers, corruption has become a part of everyday life and those that benefit most from the situation often hold official positions within the political and social elite and have little interest in promoting change (BBC, 2015, March 13).

Surrounding the call for reform, there are also increasing reports of the accelerating growth of inequality and elitism in Cuba and how this transgresses the principles of the revolution and has created “an entirely new social hierarchy” (Wilson, 2011, p. 70). In the foreign press, for example, there are descriptions of everyday corruption in Cuba amongst officials at a high level, including receiving “sums of money and quantities of products far in excess of what was due to them by law”, “nepotism” and “family trips abroad, paradisiacal vacations at beachside resorts, free cars and

gasoline for all of them, nice houses always available, all types of gratification for secret lovers” (Havana Times, 2012, September 26). Likewise, in a series of articles, the Spanish newspaper, *El País*, published several US diplomatic communiqués released by Wikileaks, which portray the type of corruption being practised in Cuba, introduced as:

Sobornos, mordidas, comisiones ilegales, tráfico de influencias... Los informes detallan la generalización de prácticas corruptas en un sistema asediado por la penuria

Bribes, backhanders, illegal orders, influence peddling...the reports detail the generalised corrupt practices in a system crippled by penury

(El País, 2011, January 22)

The article goes on to allege that the justice system in Cuba "is characterized by corruption and subservience to political dictates" and that "deceit has become a way of life", in which "bribery is used to get good jobs", where "preferential access to televisions and refrigerators" is given to "good revolutionaries ... and those that can afford them" and "generalized theft and corruption" exists in the tourism, construction, shipping and food sectors and police "are famous for taking bribes" (ibid).

Finally, perhaps the harshest criticism comes from one of the sources that would normally laud the socialist legacy that Cuba claims, The Socialist Review, which laments the "generalised theft and corruption" and "the privileged minority within the state" and the "beneficiaries of corruption" and concludes:

But if socialism is the "self-emancipation of the working class", the increasing marginalisation of the working class from power, the absence of any organs of independent class organisation, and the existence of a ruling class that has kept itself in power for over five decades - and is now enacting this new raft of measures - make nonsense of the claim that Cuba's process is socialist.

(Socialist Review, 2011)

Within this framework of growing inequality and continuing social control, sojourner life is deeply affected by the ongoing social change within Cuban life and these themes provide context for the cases that I present in Chapter 5.

2.4.10 Human rights in Cuba

The human rights situation in Cuba has long been under scrutiny from international agencies and governments and it is laid out clearly in reports by independent agencies such as Amnesty International (*Amnesty International Annual Report, 2010*), Human Rights Watch (*Human rights Watch World Report: Cuba, 2014*), Reporters Without Borders (*Reporters Without Borders: Cuba, 2015*), amongst others.

The alleged repressive nature of the Cuban regime and its centralised control of information and the media is described in the following extract.

In Cuba the state has a virtual monopoly of press and broadcast media and tight restrictions apply to the internet. Anyone who expresses views critical of the government runs the risk of harassment, arbitrary detention and criminal prosecution. Dozens of prisoners of conscience continue to serve long prison sentences in Cuba for exercising freedom of expression.

(Amnesty International, June 2010, p.2)

The report is also critical of restrictions on movement and association and describes how civil disobedience is sanctioned, creating a climate of substantial intimidation amongst ordinary Cubans.

Unlawful restrictions on freedom of expression are underpinned by other restrictions on human rights, such as the rights to freedom of association, of peaceful assembly and of movement. Arbitrary detention, interrogations and warnings at police stations, and other forms of temporary arrests are frequently used by the authorities to intimidate individuals critical of the prevailing state system. The cumulative effect of such practices has been to create a climate of fear in Cuban society and inhibit the development of freedom of expression.

(Amnesty International, 2010, p.2)

Similarly, another report comments that “dozens of political prisoners remain in Cuban prisons” and that “arbitrary detentions” are on the rise and totalled over 5,000 in 2012 (Human Rights Watch, 2014)

There have also been a number of examples of arrests of sojourners in Cuba, notably amongst the business or international aid community, or journalists, where individuals are not protected by diplomatic immunity and have little access to legal counsel when accused of wrong doing (*The Economist*, 2011, November 12; Reuters, 2013, May 23). While cases of arrest and imprisonment were justified by the Cuban government as being due to potentially illegal activity and processed through the official justice system, there has been a considerable amount of criticism indicating false charges, poor conditions and detention without proper legal counsel or procedures (*The Economist*, 2013, August 13). In this sense, there is concern about Cuba's ability to apply impartial judicial procedures, as it lacks "judicial independence", and "the judiciary is tightly controlled by the ruling Communist Party", and, therefore, "cannot assess individual actions separate from its own interests" (Foreign and Commonwealth Office, 2014).

In order to sustain the belief that penury in daily life is the fault of the embargo, however, the Cuban government needs to convince both its own population and the international community that it is a victim of international injustice. According to the reports mentioned above, it seeks to do this by controlling and censoring both its own internal media and the views expressed in international media forums, fomenting the image of a daily struggle to be overcome through unity, loyalty and devotion to the success of the revolution.

Restrictions on freedom of expression in Cuba are systematic and entrenched. The Cuban authorities frequently quote threats to national security, independence and sovereignty as their justification for taking action against those peacefully expressing criticisms of government policies or exposing human rights violations.

(Amnesty International 2010, p.4)

Thus, while the argument of the Cuban government is that it has to protect the revolution and, thereby, can justify control and censorship, the way it conducts this control attracts international criticism (BBC, 2015). This situation has an important influence on the sojourner experience and this will be discussed throughout this study.

2.4.11 Conclusion

This brief background to Cuba's systems and institutions and recent political change has sought to give an insight into the way Cuban society has evolved since the

revolution of 1959 to the modern day. An understanding of the basic nature of societal institutions and how they operate is essential background to understanding the context of the sojourn and how sojourners experience their daily lives, in that “we are required to look beyond personal milieu” within the structure and fabric of society in order to “possess the sociological imagination” (Mills, 1959, p.7). The importance of this to the current study is that sojourner life unfolded within the context of important social change, which had an influence on daily life, both fomenting the expansion of the informal economy and deepening the systems of control and vigilance. The increased attention on the nature of the economy and the shifting geopolitical mood around foreign investment in Cuba, intensified the vulnerability of business sojourners on the island, which had a profound effect on sojourner life.

2.5 Perspectives on Cuba

2.5.1 Introduction

In this section I explore the various viewpoints on Cuba from different perspectives. The attention that Cuba generates is substantial, because of its international reputation and the interest that surrounds the island’s history and reform process, and coverage is consequently abundant and varied. However, for a number of commentators, coverage on news and events in Cuba is subject to restrictions and scrutiny by the Cuban government (BBC, 2007, September 1; El País, 2011, September 5) and my intention here is to cast a wide net in order to incorporate alternative perspectives on life on the island and inform the “intellectual journey” required for sociological imagination (Mills, 1959, p.5). While a consideration of academic studies relating to the particular context might be expected, Antoni Kapcia points out that academic research on Cuba has tended to be positioned “between enthusiastic sympathy on the one hand and a rejection based on a priori positions about ‘Communism’ or disenchantment on the other” (Kapcia, 2008, p. 628). In his review of academic literature on Cuba, he notes,

Most obviously – because of the passions aroused, personal involvement and entrenched positions – much of the literature has tended to be polemical, or based on wishful thinking or preconceptions. It has led occasionally to clouded judgements or omission...A variation of this dichotomy has, therefore, been the division between studies written from a vantage point too close to the subject to be usefully objective or analytical, something that is true of both ends of the spectrum,

and those written at too great a distance to understand its complexity and processes.

(ibid, p. 643)

Given these limitations, I consider it appropriate to supplement academic literature on Cuba by viewing everyday reports on life on the island from a discourse perspective in order to understand the underlying assumptions being made in coverage, as this has a profound effect on the governance of daily life and the obstacles that sojourners face on a day to day basis. This is an important part of the broader dimension of the “extrasituational context”, outlined in the following chapter in section 3.2.3.2, in which participants “construct” and “manipulate” aspects of the “behavioural environment” through their interactions and activities (Duranti and Goodwin, 1992, p. 4). Different viewpoints can provide different explanations for the nature of everyday life, or allow justification for certain political and social policies, or generate different preconceptions about what life is like on the island. This, in turn, can affect public opinion and government policy, which can affect the quality of life. It is by understanding these different “discourses” that coverage of everyday events can be interpreted.

In this section, then, I first examine the official, dominant discourse in Cuba, from the point of view of the current regime and its perspective on history and contemporary world events, echoed through the state media. I then go on to explore the alternative, “demotic” discourse (Baumann, 1996), which flows through the outlawed, independent blogosphere from within Cuba and from websites and publications from expatriate Cubans. Finally, I examine perspectives on Cuba from the outside world through distinguishable genres known as “the tourist gaze” (Urry, 2002) and popular “travel journalism” (Hanusch and Fürsich, 2014), and the effect they have on international opinion on what is perceived to be happening in Cuba. Through this, divergent viewpoints on daily life and recent events in the reform process can be contrasted and presented as a backdrop to the ethnography that is presented through the accounts of sojourners in later chapters.

2.5.2 “Granma”: The dominant discourse

2.5.2.1 Introduction

As we have seen, because the Cuban state monopolises and monitors all means of official communication within Cuba, information about life on the island tends to come from a single source (Amnesty International, 2010) 2010, headed by the state controlled “*Granma*” (named after the boat used by Fidel Castro and his comrades to reach Cuba in 1956 to set out on the road towards revolution). There are no officially permissible independent sources of information other than through state channels and any coverage from international sources is subject to censorship and sanction (BBC, 2007, September 1; El País, 2011, September 5). In this sense, the regime can dominate the discourse and interpretation and analysis of events which its citizens have access to when making sense of their social world and can provide explanations about history and the outside world which can shape people’s beliefs about how society is governed. In this sense, the Cuban regime can create “imaginary representations” of the world and transform these into reality by controlling most sources of information (Fairclough, 2006, 26).

2.5.2.2 Myth and ideology

Even within the academic sphere, attention has tended to focus on conceptual or mythical notions of Cuba, rather than what might be of concern on a day to day basis, as Kaptcia (2008) notes,

This introduces another point in this discussion: the nature of ‘Cuba’. For this survey of the literature has thrown up yet a further pattern: the tendency for studies either to be focussed on ‘Cuba’ (as idea or as myth, as something larger than the reality), usually meaning a sympathetic and continuing focus on ‘The Revolution’, or alternatively on ‘Fidel’...

(ibid, p. 649)

In this vein, according to Barthes (1972), the meaning or “connotation” given to language in specific contexts can create “cultural myths”, which serve to sustain dominant belief systems or “ideologies”. In this way, certain concepts and narratives can be seen to prevail within given sociocultural and political frameworks embodied within a “dominant discourse” (Baumann, 1996), influencing the way people interpret the world around them. This is particularly poignant within Cuba, where alternative discourses to official governmental communication are actively suppressed, as we

have seen in 2.4.6 (Amnesty International, 2010, p.2). The consequence of this is that daily life is overtly influenced by politics and ideology, with the principles of the revolution often being cited by officials to explain decision-making and the need for individuals to sacrifice personal interest for the well-being of society in general. An example of this is the way everyday criminal acts, such as robbery, burglary and larceny, or certain behaviours, such as “loafing at work”, are classified as counter revolutionary behaviour and a danger to the state and, thereby, attract 20-30 years of imprisonment as punishment (Schichor and Heeren, 1989, p. 221). In this sense, politicising crime and certain forms of social behaviour legitimises the control of the state in all aspects of daily life (ibid, p. 224).

Such common narratives and themes from official discourse are also discussed in social conversation, which, in a sense, becomes more powerful and significant than political messaging, as most of the population sees the explanations of the way things are as natural, rather than politically or socially constructed. In this way, the interplay of control and propaganda creates a strong culture of compliance and collusion, as noted by Aguirre (2002).

A language of reconstructed myths and rituals supports the continuation of Cuba’s political regime (a topic on which scholarship is scant). True to the principle of freedom and restraint, it is a language in which people participate freely and also within the constraints of the official reconstructed versions.

(Aguirre, 2002, p. 72)

In this sense, loyalty to the revolution is part of the fabric of everyday life in a complex relationship between citizens and the state, in which the harshness of daily survival produces a mixture of persistent loyalty, on the one hand, and counter-revolutionary behaviours on the other, as Wilson (2011) notes,

One thing is clear—the Cuban state endures not only because citizens obey its laws, internalize its norms, believe its leaders’ proclamations, and follow the life course laid out by its institutions in a consistent and reliable manner. Most Cubans violate socialist laws and values as often as they uphold them. The same Cuban citizen who steals from his workplace, sleeps through his shift, plans to emigrate or escape from the country, buys everything on the black market, tells Castro jokes, or trades sex for hard currency, will also march behind Castro at a government rally,

attend the neighborhood committee meetings, and passionately defend aspects of the revolution to outsiders.

(Wilson, 2011, p.2)

In this sense, “the Cuban state does not rely primarily on repression to maintain its power” (ibid, p. 5), but oversees a “culture of impotence” (ibid, p. 102), in which most people may deride and complain about daily conditions as a safety valve, mainly through humour, but refrain from political activism.

Aguirre (2002) goes into more detail on this, describing what he considers to be the most important myths and rituals expressed in official discourse:

...the armed struggle against the dictator Fulgencio Batista, the internationalism of Ernesto “Che” Guevara, the myth of national origins around Jose Marti, Antonio Maceo, the wars of independence (1868 and 1895), the sinking of the U.S. battleship Maine in 1898, and the purported evil intent of the United States. These are reconstructed purposefully by the regime and re-enacted in ritualized pageantry at appropriate intervals ... to lend support to the regime’s ideology and increase its legitimacy.

(Aguirre, 2002, p.72)

An example of how myths may be generated in the dominant discourse can be seen in Appendix A, which is the front page of a daily edition of *Granma*. The official ‘history’ and worldview of the Cuban regime are very much at the heart of this daily publication and there are common and repeated themes, such as images and stories highlighting the constant threat from the United States and the injustice of the embargo (see “US blockade of Cuba: The Price of a Lie” in Appendix A), for example, and the perceived behaviour of the US government towards Cuba recognised by international organisations (see “Bush's Annexationist Scheme: The UN: Another Slap in Its Face” and “The WTO and US Misappropriation of Cuban Trade Mark” in Appendix A). Language in the media is strongly evocative of a people suffering tyranny and misfortune, arousing the valedictory poetic style of the legendary Jose Martí. For example,

These transfers of property were lawfully conducted following the triumphant revolution against the pervasive Yankee monopolies that had for decades drained the resources of the Cuban people.

(*Granma*, 2010, June 26, Appendix A)

2.5.2.3 The role of victim

The role of the victim is also a recurrent theme in the state media and people are called to work harder and show self-control in order to protect the revolution (see “We Must Maintain a Revolutionary Attitude toward Work“ in Appendix A). In this sense, the scarcity experienced in Cuba is portrayed by the authorities as being beyond their control and stresses the need for the population to remain loyal and hard-working. As Fidel points out,

...many people do not understand that the socialist State, or no state, no system can give out what it has, and much less it will have if it is not able to produce it, particularly if it is giving out money with no productive response. I am sure that excessive work posts, the excessive amount of money given to the people, idle stocks and waste of resources have a lot to do with the huge number of unprofitable companies we have in the country.

(ibid, Appendix A)

Here we see the image and words of Fidel Castro, symbol of the revolution, criticising the population for “no productive response”, which is portrayed as contributing to the current economic penury and which is damaging the revolution. These themes are mirrored in current discussions and pronouncements on the need to adapt the socialist economic model and move away from state paternalism. Aguirre (2002) comments on the imagery of this.

Castro’s public rhetoric can best be understood through the metaphor of melodrama. The formal aspects of melodrama as a genre of theatre are well understood (Hatlen 1992). The action centers on a grave conflict bringing tremendous difficulties, such as physical impairment, economic and material exploitation, dangers, and moral sufferings. Key to melodrama is the life-and-death struggle between good and evil. There is a villain and a morally pure, vulnerable victim. Then there is the hero, weak in material resources but a giant in virtue.

(Aguirre, 2002, p. 75)

Again, this comes to the fore in social conversation, where arduous economic and social conditions, climatic challenges during the summer months and the historic tussle with *el imperialismo* (“imperialism”, in reference to the United States), create a sense of struggle and heroic stoicism in everyday life. As Wilson (2011) points out,

The words *luchar*, a verb meaning “to struggle,” and *la lucha*, the noun form of the word, are frequently invoked by Cubans in talking about their lives and work. Many Cubans speak of themselves as permanently engaged in *la lucha*-even sitting in a cafeteria drinking rum with his friends, one individual insisted he was at that very moment *luchando*, or struggling.

(Wilson, 2011, p. 24)

As we shall see in the accounts of sojourners in chapter 5, economic problems mean that everyday life in Cuba is precarious and elements of melodrama provided by the reality of and reference to frequent power outages and cuts in water supply, or inconsistent food supplies, or the imminent approach of a hurricane, and so on. It is a justification for a constant sense of emergency and legitimises the need for control, as indicated in one of the items from Appendix A (“Comptroller General Calls for more Self Control”). In this way, the regime can justify the need to maintain vigilance and control and can deflect attention away from the poor state of the economy and the harshness of daily life (Sánchez, 2014).

2.5.2.4 Voices from history

To support underlying messages, it is also common to see in daily news images of and quotes from charismatic historical figures and personalities of the Cuban struggle and the revolution. Such figures can serve to legitimise important messages aimed at the population by creating the impression that they derive directly from history and represent “authenticity” or “truth”. As Aguirre describes,

Social control in Cuba also comes from the charismatic authority of Fidel Castro. That charisma is inculcated partly as people are socialized and as they internalize Castro himself as a myth. From a perspective such as that of Barthes (1972), Castro is the central living myth of the Cuban government. The myth derives partly from a longstanding official policy and program of hero worship, a seldom-studied form of institutionalizing charisma. It is reflected in myriad ways, such as the slogan ‘Fidelidad a la patria, a la revolución, y a Fidel’ (Fidelity to the homeland, the revolution, and Fidel) or, much earlier, amid the urban reforms of the early 1960s, in the popular saying ‘Fidel, mi casa es tu casa’ (Fidel, my house is your house). The work of deconstructing this central

myth is still to be done, so that, as Barthes recognizes in all myths, confusion reigns about what is nature and what is social about the Cuban leader.

(Aguirre, 2002, p. 74)

Wilson (2011) also notes,

Many analysts conflate those state actions and structures with the person of Fidel Castro, asserting that the state, party, government, and Revolution, while obviously distinct from a living and breathing human being, are controlled to such an overwhelming degree by Fidel Castro that one can use “Castro,” “the Revolution,” or “the state” interchangeably as part of any analysis.

(Wilson, 2011, p. 10)

While some observers within Cuba have challenged the strength of this connection with Castro alone (Valdes, 2007; Kapcia, 2008), historical figures do appear in the daily press on a regular basis. In another item in the extract in Appendix A (see “Otavalo: Final Details for the ALBA Summit”), for example, the image of Jose Martí, an important historical and literary figure prominent in Cuba’s anti-colonial struggle in the nineteenth century and frequently named in the Cuban constitution, accompanies a report on an international event. Likewise, the image of Simón Bolívar, a trans-national Latin American, anti-colonial hero, also appears. The presence of these two historical figures could be interpreted as giving ancestral legitimacy to the work of ALBA (*Alianza Bolivariana para los Pueblos de Nuestra América*, or Bolivarian Alliance for the Peoples of Our America), which is an important aspect of Cuba’s international profile and defiance of United States foreign policy. Such references can reach back into history or bring to mind a common heritage with fellow Latin Americans and a common struggle with other developing nations in recapturing its pre-imperialistic identity. As these messages are associated with historical and venerated figures they can be seen to legitimise common ideological themes on a daily basis.

2.5.2.5 Cuba’s international profile

Another important theme in the dominant discourse of the regime is the need to highlight the achievements of the revolution, in culture, education, science, sport, health and so on, as indicated in 2.3 and the relevance of Cuba on the international stage. Internationalism and international reputation is important to Cuba and it sees

itself as an advocate for “underdeveloped nations” against “imperialism” (Cubanet 1992, Chapter 1, Article 12d). Cuba shows its relevance and importance both domestically and overseas by becoming involved in a wide range of international forums. After the Revolution, for example, Cuba became involved in wars in Africa and Central and South America, sending troops to Angola, Ethiopia and Mozambique, and assisting the Sandinista government in Nicaragua, amongst others (BBC, 2015). Thus, each day there are stories in the media of Cuban achievements in a wide range of activities, often in other countries. In the extract in Appendix A there are a number of items (“Internationalist Work of Cuban Stomatologists Highlighted” and “Young Cuban Dancer Stars in Venezuela”, or “Brilliant performance by Carlos Acosta in Japan”) that act as a reminder of the international recognition of Cuba’s achievements in the arts and sciences, the importance of its international political role and the world’s fascination with Cuba, its culture and its revolution, which seeks to legitimise the continuation of the regime and justify the repression of dissidence (Aguirre, 2002).

2.5.2.6 Street advertising

No private advertising is allowed in Cuba and all street advertising and billboards are controlled by the authorities and tend to be used for messages that support the revolution, often using the same historical figures mentioned above, who are seen to be re-iterating the lessons from history. These billboards can be seen all over Cuba in towns and on roadsides, reminding the population and visitors of the achievements of the revolution, the threats that the revolution is under from external sources and the need to uphold revolutionary values, as indicated below in Figure 2.3. Here we see the authoritative and heroic historical image of Jose Martí, calling Cubans to unite to defend their heritage with the message, “*Haga cada cual su parte del deber y nadie podrá vencernos*” (“Let everyone do his duty and nobody can defeat us”) (photo provided by the author).



Figure 2.3 “Let everyone do their duty and nobody can defeat us” (Jose Martí)

In another billboard (Figure 2.4) we see the image of the legendary Che Guevara in guerrilla attire with the message that “*Toda nuestra acción es un grito contra el imperialismo*” (“All our actions are a cry against imperialism”) (photo provided by the author).



Figure 2.4 “All our actions are a cry against imperialism” (Che Guevara)

In this sense, and in the absence of private advertising, the focus of everyday life remains firmly on *la lucha* (the struggle) and the principles of the revolution on a day to day basis (Wilson, 2011).

2.5.2.7 Conclusion

In summary, control and censorship enables the Cuban state to monopolise information and analysis that its citizens have access to when interpreting their social reality by providing explanations about history and the outside world that can influence their beliefs and perceptions about how society is governed. This process serves to create the “officially imagined worlds” (Berger 1990, 29) that afford the ruling elite legitimacy in the choices it makes in the governance of everyday life. In this sense, formal and informal systems of control are expressed through ideological discourse that secures power and hegemony (Fairclough, 1995: pp. 132-3) and “decrees the superiority” of the regime’s construction of reality over others (Holliday, 2011, p. 146). This can be problematic for the sojourner adjustment process, for two reasons. Firstly, because a high level of social control involves a good deal of surveillance and censorship, together with the sense of ongoing monitoring and fear of potential consequences for saying the wrong thing to the wrong person that this might engender, which can have a demoralising effect in everyday life and create anxieties that hamper adjustment. Furthermore, the ideological battles that persist between different political and international opponents, such as in the case of the debate on the US embargo of Cuba, can obscure the very real socio-economic issues that dominate everyday life in Cuba and can hinder progress towards finding solutions to scarcity and inequality.

2.5.3 “La blogosfera”: The demotic discourse

2.5.3.1 Introduction

We have seen how the Cuban authorities maintain control of the media and communications in Cuba and seek to insulate its population from outside influence, thereby facilitating dominance in the portrayal of the benefits of the revolution. As explained, there are conflicting worldviews at play in the ongoing debate around the revolution, but an important emerging aspect of this debate is the increasing incidence of alternative voices expressed through the emerging local blogosphere in Cuba, which is illegal and can be said to contribute to the “demotic discourse” that pervades everyday life (Baumann, 1996).

2.5.3.2 Alternative voices

The growth and proliferation of the blogosphere has immense value for the appreciation of day to day life in Cuba. It leads to a diversification of information and viewpoints on life and events and offers an alternative voice to the persistence of government messages. It also serves as an alternative to the attention from outside interests that may seek to either undermine or “exoticise” (Holliday et al, 2004) government ideology. Because of its illegality, the developing local blogging community in Cuba is largely clandestine and openly subversive, expressing its intent on raising awareness of individual abuse and on directing public debate away from the established official doctrine towards issues experienced by ordinary Cubans. Bloggers not only have to overcome the challenge of severe technological limitations involved in illegal internet access and monitoring by the authorities, they also run considerable personal risks in attempt to address the “ideology fatigue” manifested in a “generational disconnection” in their challenge of the “old guard” (BBC, 2009, October 8).

2.5.3.3 Generation Y

The most renowned of these blogs is Yoanni Sánchez’s prize-winning blog and website *Generation Y* blog, named after the generation of young people “with names that start with or contain a Y”, who were born in Cuba in the '70s and '80s at the height of Soviet involvement, which influenced the choice of names, such as Yanisleidi, Yoandri, Yusimí, Yuniesky and others, because "Cuba is a country where everything was rationed and controlled except the naming of your children and creating names was a way of rebelling” (Newsweek, 2008). The blog is particularly significant, because Sánchez has maintained residence in Cuba, and, until recently, was not allowed to travel outside Cuba by the authorities. At the same time she has remained openly critical of the regime, which has resulted in her frequent detention and maltreatment (Knight Center, 2012, November 9; BBC 2012, October 5). While most other bloggers are also resident in Cuba, Sánchez has received international acclaim for her portrayal of repression (BBC, October 14, 2009), and is a leading exponent of “blind blogging”, described as people who can blog, but not see responses due to internet censorship (Sánchez, 2013, November 13). Sánchez is now allowed to travel and contributes to the debate on Cuba in the international media.

As an example of her intervention, Sánchez maintains that the Cuban government manipulates international opinion to create a sense of victimhood, while, at the same time, obstructing progress and freedom at home in order to retain control. In the following extract, she describes the appearance and speech against the US embargo of Cuba's Foreign Minister, Felipe Perez Roque, at the United Nations, where "the exalted official exposed what many know by heart: the multiple effects resulting from these limitations — since 1962 — to industry, technological development and even public health", but "said nothing about the internal siege that we suffer from, nothing about that other wall of censorship and punishment".

The five decade prolongation of the "blockade" has allowed every setback we've suffered to be explained as stemming from it, justified by its effects. But its existence has not prevented the luxurious mansions of the nomenklatura from swimming in whiskey, their freezers packed with food while modern cars sit in the garages. To make matters worse, the economic fence has helped to fuel the idea of a place besieged, where dissent comes to be equated with an act of treason. The exterior blockade has strengthened the interior blockade.

(Sánchez, 2011, October 25)

Yoanni Sánchez's "Generation Y" is hosted on a portal called *Desde Cuba* ("From Cuba"), available at <http://www.desdecuba.com/> in Spanish and English, which describes itself as presenting accounts "from a point of view distinct from that of the Cuban government". It also contains 50 links to local outlawed blogs and is a mine of information from the demotic sphere and is listed, along with other sources, in Appendix C.

2.5.3.4 *Cartas desde Cuba*

Another fascinating weekly blog from within Cuba, *Cartas desde Cuba* ("Letters from Cuba"), originally hosted by the BBC World site, "BBC Mundo", in Spanish and now independent. In this blog Fernando Ravensberg, a Latin American journalist resident in Cuba, gives weekly accounts of aspects of life in Cuba. It is not an uncritical account of the administration of everyday life by the regime, but Ravensberg, who resides in Cuba and is known to the authorities, attempts to offer a balanced view of everyday life. For example, in his article *Excusas y contexts* ("Excuses and contexts"), Ravensberg comments on how the Cuban government uses ideology to justify

maintaining the status quo of the current political system and, in particular, on the excuse of the blockade for the country's troubles, but he also echoes the government's call for change. He concludes, "*Es hora de dejar de lamentarse por el bloqueo y empezar a trabajar*" ("It's time to stop complaining about the embargo and start working") (Ravsberg, 2010, October 26).

Ravsberg's blog is significant because it has offered frequent commentary on the reform process in Cuba and is critical of the slow pace of reform and the inherent contradictions in it (Ravsberg, 2011, February 24). In his view, corruption has become a way of accessing a better life for an elite and that there are too many people in positions of authority that benefit from the current political and social order for change to take place and that the whole process is a means of manipulating international opinion on Cuba while maintaining the status quo. For Ravsberg, for example,

... la clase surgió...por algunos dirigentes empresariales del Estado, los que llevan en el mismo bolsillo el carnet del Partido Comunista y las tarjetas de crédito de sus cuentas en el extranjero.

...a new class has emerged... overseen by a few leaders in state circles, who carry their Communist Party card and credit cards from their overseas accounts in the same pocket.

(Ravsberg, 2011, August 18)

2.5.3.5 Conclusion

In many respects, the blogosphere is an expression of a generational confrontation between the revolution's founding generation (and their extended families) and those that feel excluded from power and from contact with the modern world, as the media is state controlled and the internet carefully monitored and prohibited for private use (Sánchez, 2011), as described in 2.4.6. The leading members of the government are largely octogenarians and septuagenarians, who were at the forefront of the revolution, and are a lasting reminder of the past from which they claim legitimacy of their authority to monitor everyday life (ibid). Despite the overriding predominance of revolutionary rhetoric from official media channels, Cuba could now be described as being in a post-revolutionary era, with a consolidated political elite, controlling most aspects of daily life, and it is this that the demotic discourse of the blogosphere is

trying to draw attention to (<http://www.desdecuba.com/>). From the point of view of sojourners, it is convenient that discord is reported, as it creates a more realistic and balanced view of daily life amongst the international community and can increase pressure for reform and change, which can help to mitigate economic problems and its socio-political consequences for residents.

2.5.4 Perspectives from outside Cuba

2.5.4.1 Introduction

As described in 2.5.2.5 Cuba's international profile generates interest from outside Cuba, and the role of resident foreign journalists in Cuba is an important source of information about life on the island. There are a number of resident correspondents in Cuba, who report for recognised international agencies and news and media publications, such as the BBC, El País, Reuters and Agence France-Presse (AFP), which report regularly on the reform process in Cuba and which have followed the détente between Cuba and the United States leading to the recent re-establishment of diplomatic relations between the two countries. Coverage from resident journalists, however, has to be carefully written so as to give as balanced a view as possible on local events without attracting scrutiny from the authorities, as indicated in 2.4.6. In contrast to this informed reporting, views expressed from an outside perspective may have to rely heavily on stereotypical images of Cuba and tend towards "exoticisation" (Holliday et al, 2004, p.59). To this I would add the counter tendency of "demonisation", which focuses on persistently negative stereotypes of a given context. This section outlines these external perspectives on life in Cuba and the effect that they have on sojourner adjustment.

2.5.4.2 Exotic Cuba or Demonic Cuba?

While exoticization is common within international tourism (Stronza, 2001), it is particularly relevant to Cuba, given the ubiquity of the iconic images of the Cuban revolution and its protagonists, such as Che Guevara and Fidel Castro, in the press and on the streets and roadsides, and its advocates through history, such as Ernest Hemingway and Gabriel García Márquez, and their importance to contemporary American history. This, coupled with its Caribbean climate, makes Cuba a popular tourist destination, not least for those seeking an "authentic" experience through the "commoditization of cultural products" (Cohen, 1988). Such an experience focuses on easily accessible images, such as music and dance and cuisine in the case of

Cuba, but also builds on the revolutionary legacy and paraphernalia that surround the icons of history mentioned above, as well as exposure to the dominant discourse explaining the current economic difficulties and the reform process from the official point of view. While this is not uncommon in tourism, as mentioned above, in the case of Cuba it serves to mask other discourses that exist within the demotic sphere and within the more balanced accounts of residential journalists and builds an artificial view of daily life through “the tourist gaze” (Urry, 2002).

Alternatively, there has also been a tendency to demonise the Cuban revolution from very early on, resulting in quite polarised interpretations of everyday life. As Kapcia (2008) notes in his review of research on Cuba,

First, many analyses still arose from the same *a priori* political positions, either justifying or opposing the changes. This arose from the fact that most early writing on Cuba was North American, and in the contemporary United States few could be really objective about a nearby Soviet-linked socialist revolution or about the ‘loss’ of Cuba.

(ibid, p. 629)

While this tradition undoubtedly continues to this day, largely amongst the press and media channels controlled by the Cuban émigré community and lobbyists in the United States, it is not as much in evidence in everyday discourse on the island itself, because of state censorship, although it can impinge upon initial sojourner perspectives particularly at the beginning of the sojourn.

2.5.4.3 The “tourist gaze”

The “tourist gaze” (Urry, 2002) on Cuba is particularly prominent in that the expectations and experience of cross-cultural contact for tourists are normally reported as overwhelmingly positive and there are many enthusiastic video diaries on *YouTube* describing encounters with daily life. On the one hand, travel guides highlight the heritage, natural beauty and cultural wealth of the Caribbean island, captured, as an example, in *The Guardian’s* travel guide the *Insider’s Guide to Havana*.

Everything in Havana inspires dance. There is music wherever you go. Always music. That's why people say that even when we Cubans walk, we walk as if we are dancing.

(The Guardian, 2008, March 8)

Cuba is portrayed from the outset as a tourist destination with a rich folklore emanating from the warmth of its fun-loving people. In addition, on the other hand, tourists also expect to be able to gaze upon real life manifestations of the revolution, such as vintage cars and the propaganda billboards shown in 2.4.2.5. In this sense, Cuba is portrayed as more than an exotic, getaway destination or an idyllic Caribbean island, it is also the scene of the world's most famous modern day revolutions. For this reason,

For the last quarter of a century the face of Cuba has worn a beard and a green cap. Castro, the friend of countless hijackers, has succeeded in hijacking not only a country, but – perhaps even more extraordinary – its reputation.

(Ratliff, 1987, p. 157)

It could be argued that the exotic image of Cuba is simply a marketing tool for travel companies spurred by commercial gain and that it is not unusual (Stronza, 2001). At the same time, while the local population can improve their quality of life from contact with the tourist industry, tourism has certainly contributed to the “reconstruction” (ibid, p.271) or repositioning of post-revolutionary Cuban society in terms of growing elitism and inequality, outlined in 2.4.8. Furthermore, the Cuban tourist experience has also come under some scrutiny regarding the exploitation of vulnerable persons as a consequence of economic inequity between locals and rich tourists and the need and temptation to search for supplementary means of income (O'Connell Davidson and Sánchez Taylor, 1996), although this darker side of tourism, for some commentators, passes largely unrecognised (Havana Times, 2013, March 30).

2.5.4.4 Travel journalism

In contrast to the serious day to day reporting done by resident journalists in Cuba, is the transitory journalism generated by the foreign popular media from external sources or from short-term, unofficial “travel journalists” (Hanusch and Fürsich, 2014) to the island, in search of the “real” or “authentic” Cuba through a quick, often

undercover, exotic snapshot of local life. However, access to the island for visiting journalists is highly monitored and information about everyday life scarce and either channelled through official media or censored resident foreign journalists, which limits material for the popular media and which encourages superficial and exoticised documentary reporting (Ravsberg, 2011, February, 3). A recent example of this is a BBC documentary, which depicts Cuba as a “unique blend of sun, sea and revolution...one of the most seductive places on earth” and describes how the “adventurer and journalist... gets under the skin of a colourful and vibrant country famous for its hospitality and humour and asks if this new economic openness could lead to political liberalisation in a totalitarian country with a poor human rights record.” (Reeve, 2012, December 1). The documentary, while trying to portray contrasting perspectives, has had mixed reviews and, as one review in *The Guardian* suggested, clearly, “a one-hour documentary was only ever going to scratch Cuba's surface”, as the reporter goes around the island with a small camcorder, interviewing “ordinary Cubans” away from the surveillance of local law enforcement, “who come across as resourceful and uncomplaining, bearing in mind that complaining isn't really allowed” (Dowling, 2012, December 11). As the reviewer notes:

There are two basic stories to tell about Cuba: one is of a socialist paradise with cool cars, lovely, crumbly buildings and a 99.8% literacy rate; the other is about a savagely repressive totalitarian state with a failed economy, beset by corruption, poverty and fear.

(Dowling, 2012, December 11)

The reviewer concludes that “given the limitations” on reporting in Cuba by the foreign popular media and where “getting a Cuban to say anything remotely critical – or even mildly speculative – on camera is all but impossible”, the report comes across as stereotypical and exoticised, in which most of the journalist’s criticism was “reserved for the voiceover” (ibid).

Apart from the debate amongst news channels and popular video magazines on the internet, there are also many interesting private accounts about Cuba, recorded by individuals visiting the island, trying to get an objective perspective behind the façade of the short-term tourist experience. In one example, in an interview filmed

clandestinely in a remote location by a group of visitors to Cuba, the difficulty of life on the island is described first hand by “a Cuban named Roberto”, who, according to the film-makers, “was the first person to say a single negative thing about life in Cuba”. He describes the low wages, the poor diet and the general vulnerability of everyday life for Cubans in the face of what he depicts as a harsh, authoritarian and punitive regime (St. Pierre, 2010, June 27).

2.5.4.5 Conclusion

Perspectives and accounts of life in Cuba from an exotic point of view, then, perhaps differ, in essence, from the perspective of longer term sojourners and resident journalists, who experience life on a daily basis and can balance out the staged authenticity referred to above with personal experiences over a prolonged period of time. Exoticisation and the search for the “authentic” Cuba by occasional travellers and short-term visitors can indirectly influence the longer term adjustment process, because it distorts the image of everyday life in Cuba and encourages a transactional attitude towards foreign visitors, which, in turn, can create greater inequality and uncertainty in local conditions.

2.5.5 Summary of perspectives on Cuba

Overall, the different perspectives and discourses surrounding recent Cuban history and events create contrasting and contradictory impressions about life in Cuba. The acute shortage of freely accessible information and the lack of transparency towards open reporting on life on the island generates impressions that are unusually fuelled by ideology and belief, rather than by evidence or experience and this has created quite considerable and polarised divisions in international opinion on the actual state of Cuban society. This tends to be mirrored within the academic literature on Cuba, which is overwhelmingly historical and ideological and hampered by the lack of free access to the research terrain (this is discussed in detail in section 4.3). Explaining the various discourses contributes to an analysis of the context of research through sociological imagination, as we “grasp history and biography and the relations between the two within society” (Mills, 1959, p. 12). Beyond the more concrete and observable aspects of institutional and structural pressures, how individuals construct their social reality is also influenced the beliefs and constructions that they have at their disposal. The sojourner adjustment process is made all the more complicated and ambiguous, as a result and, for this reason, it makes first-hand

accounts of life on the island and studies, such as this ethnography, all the more valuable as a source of analysis of daily life in Cuba.

2.6 Summary

The purpose of this chapter has been to give insight into the context of everyday life for sojourners in Cuba in order to be able to interpret the accounts of sojourners for this ethnographic study. In this, I have sought to trace “linkages among a great variety of milieux” (Mills, 1959, p. 7) within the frame of structure and context in order to benefit from sociological imagination. This has included an outline of aspects of life in Cuba, but it has also included an analysis of the historical, political and socio-economic background which underpins and influences everyday life on the island. The social landscape of Cuba is complex and deeply intertwined with its recent history and its standing on the international stage to an extent that is unusual for an assignment location for international sojourners. While this has an indirect influence on sojourner life in Cuba, it creates a politically sensitive context which produces a certain degree of uncertainty for foreign residents, as well as an unusual level of surveillance and monitoring, which, in turn, has a profound effect on the adjustment process for sojourners.

The representation of daily life has also been examined from different viewpoints, because of the restrictions on information and coverage of events and perspectives on daily life levied through official media channels, revealing ideological disparities in the interpretation of the context of Cuba both from within the island and from the outside. The dominant position of official discourse is particularly relevant to sojourner adjustment, because it serves to legitimise social control and justify the political choices made by the government, which can inhibit economic and political change (Aguirre, 2002; Wilson, 2011; Sánchez, 2011). The presentation of alternative discourses, particularly through the blogosphere, has been important to reveal both the discord that exists amongst residents in Cuba and the potential distortion that the process of international exoticisation of Cuba places on the interpretation of the context, which affects political and economic choices. Adjustment to such an unusual setting is the subject of this research project, which seeks to understand the challenges that international expatriates face and the choices that they make in coping with their new environment.

Chapter 3. Literature review

3.1 Introduction

In the previous chapter, I examined the context of the research project by outlining some of the main aspects of contemporary Cuban history and society and described how this impinges upon local life for both the local population and the sojourner population in Havana. This chapter reviews the relevant research literature relating to the changes experienced by individuals when they move into an unfamiliar cultural environment and explores the exact nature of the term “culture shock” and how it is understood and used in this study. One of the main challenges of doing this is that there is a good deal of ambiguity in the way concepts are employed in the literature on cross-cultural transition. For example, concepts such as “adjustment”, “adaptation”, and “acculturation”, are often used as alternatives to “culture shock”, and often interchangeably (Haselberger and Brewster, 2008, p. 236). There is also debate around what should be considered “cross-cultural”, “intercultural” and “intracultural”, resulting in some uncertainty and overlap in the use of terminology (Spencer-Oatey and Kotoff, 2009, p.1). Furthermore, there is a considerable range of disciplines and traditions that inform research terminology, including those from “mental health”, “sojourner adjustment”, “stress and coping”, “culture learning”, “cross-cultural transition”, “intercultural communication”, “culture shock”, “psychology”, “social identity” and “communication studies” (Ward et al, 2001, p. 43). To this I would add much recent research in “applied linguistics” (Young et al, 2009) and perspectives from “social anthropology” (Wolf, 1982; Goffman, 1974) on the one hand, but also studies emerging from the tradition of “critical management studies” (Alvesson and Willmott, 1992), which challenge some of the fundamental assumptions of studies in “International Management” and “Cross-Cultural Management” (Jack et al, 2008; Bjerregaard et al, 2009).

For this reason, I first discuss the key concepts that I will be using in this study in order to be clear about my assumptions and terminology. This is followed by an outline of how “expatriate adjustment” is treated in research literature and explores the nature of intercultural contact and the factors that can influence adjustment, including social networks and the role of the spouse and family on international assignments. This will facilitate a better understanding of the adjustment of

sojourners to the cultural context of Cuba and will inform much of the analysis of data in later chapters.

3.2 Key concepts

3.2.1 Introduction

This section explains the assumptions and definitions of key concepts which underpin this research project. In general, the approach adopted rejects stable, *a priori* categories and definitions that de-contextualise and generalise about social behaviour. In this sense, social experience and the cultural meaning attributed to it by individuals are an integral part of social interaction, which is influenced by the social, economic and political relationships in which they are framed. This brings into view a certain perspective on what we mean by “culture” and “cultural identity”, viewing such notions as processes, rather than substantive products that can be reduced to stereotyped classifications such as “nationality” or “ethnicity”, which could lead to a “billiard ball” view of nations of self-enclosed units knocking against each other (Wolf, 1982). It also brings into view the nature of “context”, considering it not as an external and static arena to social behaviour, but as an integral and dynamic aspect of everyday discourse. Much of the research into intercultural communication and expatriate adjustment, from the point of view of “International Management Studies”, neglects to explore the nature of interaction and the role of power and society in influencing relations between groups of people (Jack et al, 2008). In this sense, there is a call for a move away from cultural determinism towards a perspective of seeing culture in context, as described by Bjerregaard et al (2009).

There is a perceived need for better understanding of the reciprocal interplay between culture processes and context in shaping communication. Thus, there is a need for richer accounts of the social, economic and political contexts that are constitutive of interaction in multicultural settings. If power is viewed as immanent in all social relationships, as many social anthropologists argue (Wolf, 1999), future research could draw inspiration from the anthropological literature on the integral role of power in the struggle over, institutionalization and reproduction of culture.

Bjerregaard et al (2009, p. 219)

In this sense, this study seeks to draw on other disciplines, such as Anthropology, Applied Linguistics and Cultural Studies in order to re-assess concepts and assumptions in the field of international expatriate research from an interactionist and

social constructionist perspective and, thereby, offer an alternative understanding of the notion of “culture shock”. This section examines the key concepts that will facilitate an adequate understanding of cultural complexity from such a perspective.

3.2.2 Culture

The concept of “culture” is a very broadly used, complex term (Jenks, 2005, p.1), but it is important to be clear about the use of the term from the outset and, for this reason, I outline in this section the main theoretical traditions and perspectives that I draw on to define it.

3.2.2.1 The nature of culture: Essentialism and non-essentialism

The concept of culture used in this study is from a non-essentialist, social constructionist perspective, viewing culture more as a social process, in which social actors seek to interpret and make sense of the world alongside other human beings in a given context, rather than as a static and reified concept existing beyond and external to social interaction. This does not exclude acculturating influences on individuals, such as shared meaning, tradition, national symbols and values, and so on, but it does not accept acculturation as a determining factor in social or cultural identity. In this sense, the underlying assumption is that human beings interact with “a specific cultural and social order”, which influences their development and view of the world as they are socialised and develop, as indicated by Berger and Luckman (1967).

...knowledge is transmitted to the next generation. It is learned as objective truth in the course of socialization and thus internalised as subjective reality. This reality in turn has power to shape the individual.

(Berger and Luckman, 1967, p.84)

While, from a social constructionist point of view, it is not just a question of transmitting knowledge down the generations, as this can be reframed or re-interpreted and can thus change in shape or form, such a perspective accepts that we, as humans, are born into and live in a social context which existed before us and which is embodied in a series of “institutional” practices and arrangements. We encounter these as “the way things are done” and, indeed, “should be done”, and if we violate them we will be sanctioned (Jenkins, 1996, pp. 158-9), while we use

language to interact with others through institutional and social relationships that also ascribe identity and roles to us. It also accepts that the acculturation process will influence the amount and type of social, economic and cultural resources we have at our disposal to create our narrative and that it will influence our worldview and our attitudes to such things as skin colour, gender, religion, age, family background and so on. However, these are mutable factors and the assumption is that there is no universal essence of culture or identity transmitted in the acculturation process of individuals, often described in terms of “ethnicity”, “nation”, “race”, and so on. Culture is created and negotiated by individuals in a social context and, in this sense, is “a stable, albeit mutable, system of relations between (visible) things in the environment of people (“forms and structures”) and their (invisible) significances, shared by a social group” (Zegezac, 2009, p. 32).

3.2.2.2 Paradigms of culture: Large and small cultures

As a result, the perspective adopted is more from the point of view of “what culture does”, rather than “what culture is” (Thornton, 1988, p.26) and it assumes that culture is constantly changing and evolving and that it is a dynamic and creative process emerging from the social construction of meaning and reality (Berger and Luckman, 1967). In this sense, Street (1993) emphasizes that “culture is a verb” and that to nominalise it is to hide “its essentially changing character and process nature” (Thornton, 1988, p. 27).

Building on this distinction of what cultures “does” and what culture “is”, Holliday (1999) introduces the notion of “two paradigms” of culture, described as “large cultures” and “small cultures”. The notion of “large culture” relates to a reified concept of culture focusing on “the essential differences between ethnic, national and international entities”, while the idea of “small cultures” refers to “any cohesive social grouping” and “is more concerned with social processes” (Holliday, 1999, p. 240), which focuses on how cultural meaning is constructed and negotiated through everyday interaction. For Holliday, the paradigm of large cultures can tend towards “cultural reductionism” or “culturalism”, in which culture has “become reified and essentialized by different parties” and which can lead to a process of “otherisation”, “whereby the ‘foreign’ is reduced to a simplistic, easily digestible, exotic or degraded stereotype” (ibid, p. 245). A “small culture” approach, on the other hand, can “liberate ‘culture’ from notions of ethnicity and nation” and thereby “illuminate full inter-cultural

complexity” (ibid p. 261). In this sense, culture is seen as a complex and dynamic process as individuals interact with each other to create shared understanding at all levels of social existence.

3.2.2.3 How culture works: aspects of cultural reality

As we have seen, the reification of culture embodied within the notion of “large cultures” overlooks a good deal of the cultural complexity of everyday social interaction. It is important to understand, however, that everyday social interaction exists within “larger sociocultural frameworks” (Malinowski, 1923, p. 306), which influence and impinge upon how social life unfolds. So, for example, while the concept of nation is inadequate to explain all aspects of cultural interaction, the reality is that the world is organised into politically defined entities, or states, that exert considerable influence on everyday life. We have seen examples of this in the current study, outlined throughout Chapter 2: Research Context, in that Cuba is a state, for example, which professes a socialist ideology and occupies a particular geopolitical position in relation to its recent history, which are factors that influence the discourse of everyday life.

Taking this into account, Holliday (2011) examines the dialogue between the various elements or “aspects of cultural reality” in order to examine how culture might work on a day to day, dynamic basis. To do this he maps out a “grammar of culture” (Holliday, 2011, p. 131), a model which includes particular social and political structures and “macro-forces”, such as “nation”, “religion”, “education”, “language”, “government” and “ideology”, which act as a backdrop, or “cultural resources”, for “underlying cultural processes”. Such processes are described as “personal trajectories and the basic fabric of small culture formation” (Holliday, 2011, p. 135) involved in the social construction of reality and the negotiation of meaning through discourse, where the perception of “culture” and “cultural identity” becomes individualised. In this sense, it is important to see individuals as possessing “a broad, rich complex of cultural realities”, a unique “cultural universe”, as a result of a personal “cultural trajectory” of experiences in different “cultural arenas”, or settings, (both material and psychological) throughout their lives (Holliday, 2011, p. 55). From the negotiation or dialogue between these two aspects emerge “particular cultural products”, which are visible or descriptive aspects of a group or society that indicate common beliefs and social practices relating to a particular way of life. It is from this

final aspect of cultural reality that stereotypes and prejudices can emerge and where ideology plays an important role in maintaining a certain worldview.

It is important to emphasise that Holliday's model is, as he warns us, only a guide that "enables us to read cultural events" and "must never be mistaken for the real terrain" (Holliday 2013, p. 1). While it is an aid to understanding, it can never capture day to day social behaviour. The notion of "culture" used in this study, then, is driven by complexity, which takes into account both the particular context of Cuba and the various influences and processes within and beyond it that make up the experience of everyday life on the island.

3.2.3 Context

In the previous section we have seen that culture should be viewed as dynamic and complex and that social interaction unfolds within a particular "context". For this study the context refers to the research context broadly named as "Cuba" or "Havana", and this is described in detail throughout Chapter 2. For ethnography, as we shall see in the following chapter, Chapter 4: Research Methodology, the research context is of particular significance, because it entails "the extended involvement of the researcher in the social life of those he or she studies" (Bryman, 2008, p. 401) and it is, thus, an important aspect of how behaviour is interpreted.

3.2.3.1 The "context of situation"

Social behaviour can be seen as purposeful in that it is driven by "practical action" and related to concerted activity and it is the "context of situation" (Malinowski, 1923), which helps us to understand the meaning of it. Without knowledge of "the background of human activities" and "human behavior in practical matters" (Malinowski, 1923, p. 312), we cannot understand the "meaning" of behaviour. It is with the "practical and active acquaintance with relevant situations" (ibid p. 325), that we can understand the "context of culture" (Kramsch, 1998, p.26). For example,

...tribal economics, social organization, kinship patterns, fertility rites, seasonal rhythms, concepts of time and space. Thus, the semantic meaning of verbal signs had to be supplemented by the pragmatic meanings of verbal actions in context.

(Kramsch, 1998, p.26)

Thus, it is only by exploring the setting of social behaviour that we can understand the purpose of it and, thereby, interpret the meaning of it. The study of context, then, is a fundamental part of understanding any aspect of behaviour in everyday life.

3.2.3.2 Dimensions of context

Context can be seen as a “frame” (Goffman, 1974), which surrounds social interaction and which contains elements of the physical environment and social experience governed by “recognizable conventions” (Duranti and Goodwin, 1992, p. 17). As an example, a defined geographical area, such as a city, can be described as,

...not simply a physical environment, but also a social one, built by other human beings through an historical process, which requires knowledge about its social dimensions (for example division of space into areas for pedestrians and areas for vehicles, historical solutions to the problem of how one navigates when these areas overlap [traffic lights and traffic regulations], a distinction between “public” and “private” space that constrains movement through physical space etc.) if one is to move through it successfully.

(Duranti and Goodwin, 1992, p. 4)

There is, thus, a “behavioural environment”, as well as a “physical environment”, within the broader “dimensions of context” (ibid, p. 7), which also include “larger social processes” and “background knowledge” as part of the “extrasituational context”, which extends beyond the “immediate setting” (ibid, p. 8) and which relates to shared history, values or beliefs, which may also invoke the rights and privileges that participants have in a particular situation and “common ground” invoked by people to establish, or show the communities to which they are associated and with which they wish to be associated (Clark, 2006, p. 105).

In this sense, Day (2008) contends that “what is relevant for participants is not always demonstrable within the observation under study” (Day, 2008, p.979), and that “what is contextually relevant is to be found in the orientations of interlocutors themselves” and their membership of different groups, rather than in the physical context (ibid, p. 980). For this reason he proposes a “messo context” in which “contextual resources lie somewhere between a “distal” and a “proximate” context, described below.

Briefly, these notions stipulate that elements of a distal context, e.g., one's ethnicity or class, can be brought to bear in an analysis of a proximate context, i.e., the interaction under study, if it can be shown that participants orient to them and that this orientation can be shown to be relevantly tied to particular actions.

(ibid, p. 980)

This is relevant to this particular study, because, as an example, as we have seen in 2.5.4.3, sojourners and the local population in Cuba live a largely segregated co-existence, with sojourners being a focus of opportunity judged by the local population as having certain needs and the means to access a particular standard of living, which they were perceived to bring to the local context. It is through the informal economy, resulting from the dual currency, which is run by the local population, that these needs are met. It could be argued that there is a "distal" expectation that foreigners in Cuba would have means to purchase goods in this way, which will influence the "behavioural environment" mentioned above.

Context, then, includes the physical environment, the social environment and "cultural and social patterns" within a setting, and the focus is on how, through language, "participants attend to, construct, and manipulate aspects of context as a constitutive feature of the activities they are engaged in" (Duranti and Goodwin, 1992, p. 9). In this sense, from a social constructionist perspective, within any given social situation, participants have the capacity to re-shape the context, not just to organise their experience of it or to negotiate their way through it. Interaction between individuals and groups is characterised by how "participants use their bodies and behavior as a resource for framing their talk" (ibid: 7) and how "people become environments for each other" (ibid, p.5). Context, then, becomes "collaboratively defined through a process of interaction" (ibid, p.18), in which "participants attend to, construct, and manipulate aspects of context as a constitutive feature of the activities they are engaged in." (ibid, p. 9). Context is not a reified, immutable state, it is an ever-changing concept influenced by the participants within it. In this sense, temporal and social settings are not fixed, but created and negotiated through social interaction.

The notion of “context” used in this study, then, goes beyond a one dimensional description of modern day Cuba and its history, its geography and its people and its institutions. It also seeks to embrace everyday discourse and the social experience of the participants within it in order to offer an interpretation of everyday life.

3.2.4 Discourse

Discourse is an important concept in this study for a number of reasons. On the one hand, it permeates aspects of cultural reality and context, in that it focuses on the day to day construction of meaning in context within “underlying cultural processes” (Holliday, 2011, p. 135). On the other, it also describes a particular “perspective” on the world or a way of “being in the world” defined by “membership of a particular social group or social network” (Gee, 1990, p. 142). In this sense, discourse can be described as a “system” or “community” in that a group has recognised members who share similar beliefs, ideology and worldview underpinned by informal power relations governed by unspoken rules and conventions that govern behaviour and how people relate to and communicate with each other (Foucault, 1972).

3.2.4.1 Discourse systems

To illustrate this, Scollon and Scollon (2001), for example, outline the notion of “systems of discourse” to include a number of “dimensions”, including “ideology” or “worldview, which governs such things as beliefs and values, “socialization” or “enculturation”, “forms of discourse”, relating to how members communicate and “face systems”, which govern interpersonal and community relations (Scollon and Scollon, 2001, p. 140). Thus, we are influenced by a range of groups and systems which we respond to from the family unit to institutions and systems that surround us in a particular setting, as described below.

...we all are simultaneously members of multiple groups, or, as we call them, “discourse systems”. None of us is fully defined by our membership in any single group. One is simultaneously a son or a daughter, a father or a mother, a member of a particular company, a member of a particular generation, and so forth in an indefinite number of discourse systems. One’s sense of identity and group membership is a composite of all these identities and a complex and sometimes difficult interaction among them.

(Scollon and Scollon, 2001, p. 170-1)

This approach to discourse and discourse systems very much ties the analysis of behaviour to situation and context, thus avoiding the problems of essentialism and reification mentioned above. It also allows us to go beyond day to day interaction and examine the “extrasituational context” (Duranti and Goodwin, 1992, p. 8), mentioned in 3.2.3.2, or wider environment and the particular political, social and economic forces that come to bear on everyday life.

3.2.4.2 *Alternative discourses*

If we are simultaneously members of and influenced by a range of discourse systems, however, it is likely that some may exert more impact than others, depending on the predominance of certain influences within a group or a society. This is explored thoroughly by Baumann (1996), who examines the response of groups and individuals who are classified as “ethnic communities” and being “between two cultures” within the “dominant discourse” of society. He also identifies a series of “alternative discourses”, which he calls the “demotic” discourse, “(lit. of the people)”, in which people challenge established notions of community and identity and recreate them through the process of everyday social interaction (ibid).

What defines Southallians’ culture is thus not that they replace the dominant discourse with the demotic one at all times. Rather, Southall culture entails a dual discursive competence, embracing the dominant as well as the demotic, and it is the dominant that emphasizes the conservation of existing *communities* and the demotic that allows Southallians to re-conceive *community* boundaries and contest the meaning of *culture*.

(Baumann, 1996, p. 195)

Thus, while, the “discourse about ethnic minorities as communities defined by a reified culture bears all the hallmarks of dominance”, Baumann also describes how the “communities” “re-map their *cultures* and *communities*” to develop individual “shifting identities” and new collective identities, such as “British *Asian Culture*” (ibid, p. 35). This creates a constant process of “making culture” and cultural identities, of people re-defining and re-negotiating who they are as individuals and as part of a collective.

It is interesting to note that, Baumann uses italics in his text in order to indicate that “they reflect local meanings and usages” and are not “ascribed” (ibid, p. xiii), in the

sense that they are open to interpretation or constructed socioculturally within a particular context. The interplay between different discourses is particularly important in this study, as explored in depth in the previous chapter in section 2.4, largely because life in Cuba is somewhat enigmatic, due to the relative insulation of the island to outside analysis because of restricted communications and the level of social control exercised by the Cuban government for reasons explained in the previous chapter. Furthermore, viewed from the outside, as described in 2.4.4, Cuba is particularly prone to “exoticisation” (Holliday et al, 2004, p. 59), because of its recent revolutionary history and the tendency to romantic “hero worship” of important historical figures (Aguirre, 2002, p. 74). In this sense, the absence of independent news media enables the state to monopolise information and the analysis that its citizens have access to when making sense of their social world by providing explanations and “dominant interpretative schemes” through “a language of reconstructed myths and rituals” about history and the outside world (Aguirre, 2002, p. 72). In contrast, from the perspective of a different worldview, Cuba is portrayed as one of the few “outposts of tyranny” remaining in the world (US Senate Foreign Relations Committee, 2005), which creates a demonic image of the government of Cuba.

Meaning, then, has historical and contextual origins, and we can assume that the perception of knowledge and truth in any given society will be influenced principally by the dominant discourse or view of the world held by the group that has the ascendancy and the means and power to enforce it. In this sense there is no “truth”, but “regimes of truth” (Foucault, 1972), where “reality” can be manipulated for political purposes or self-interest, and, in many ways, may explain the overriding tendency to equate culture with nationhood. Knowledge and truth, then, belong to whoever exercises hegemony, whether by force or by consent (Gramsci, 1971). As Berger and Luckman point out, “He who has the bigger stick has the better chance of imposing his definitions of reality” (1967, p.127).

3.2.4.3 Ideology and discourse

We have seen how discourse and the process of discursive formation provide us with ways of regulating and negotiating meaning in our construction of social reality. In this sense, consensus and control are ever bound up in language and discourse in

which ideas and beliefs are temporarily stabilised with meanings dominated by political and social forces (Hall, 1997).

This domination brings into view the concept of “ideology”, which can be described as “orders of discourse...bound up with the values and beliefs that serve particular power relations within the social context” (Clark and Ivanic, 1997, p. 13). Ideology, then, can be seen as the dominant discourse and it permeates all levels of social interaction and culture formation, as Holliday (2011) describes,

Ideology...is closely related to the social construction of reality, normalization and discourses, which are in many ways the building blocks of ideology as the higher-order belief systems.

(Holliday, 2011, p. 145)

The higher orders in a given context, then, can influence small culture formation, as they provide “cultural residues” from “cultural artefacts” and social practices embodied within “statements about culture” (Holliday, 2011, p. 145), which act as reference points when of interpreting the world by decreeing “the superiority of some constructions over others (ibid p. 146)”.

This is particularly relevant to the case of Cuba, as we have seen in section 2.2 of the previous chapter on context, where political, social and economic policy is monopolised by one state entity, the *Politburo*, in the absence of any private or independent civic institutions. The state exercises control of institutions of social organisation, formal education and public information and has a monopoly on the means of public and social order and mass persuasion, while all social behaviour becomes subject to political interpretation and state regulation. On the other hand, other interpretations of contemporary Cuba from the outside are dominated and fuelled by anti-Castro ideology, for example, or may be influenced by other ideologies and interpretations of Cuban history, to the point of creating an exactly opposite version of reality. As Wilson (2011) points out,

Depending on which account is considered, Cuban society is either perfectly egalitarian or rigidly hierarchical, its state economy satisfies the needs of all or creates intense deprivation for many, and its education and medical systems are examples for the world or chimeras for the world media. So great are the

contradictions between accounts, in fact, it is hard to believe people are speaking of the same island.

(Wilson, 2011, p.1)

Thus, by monopolising information and analysis of history and society through a certain worldview or ideology, interest groups can influence perceptions of the world and build legitimacy for political and social action (Berger 1990). In this sense, formal and informal systems of control are expressed through ideological discourse (Fairclough, 1995), which can inhibit alternative views that are at odds with official discourse and, thereby, influence international opinion of what the Cuban context is in reality.

3.2.5 Culture shock

“Culture shock” as a concept has two components to it. First, the notion of “culture”, seen here as “a whole and distinctive way of life” (Williams, 1981) and, secondly, the process of “shock”, seen here as “an active process of dealing with change” in an “unfamiliar cultural environment” (Ward et al, 2001, p. 270). In many ways it is an unsatisfactory term, as it could be said to reify behavioural processes, and, possibly for this reason, it is used interchangeably with the term “adjustment” or “adaptation” in the literature, as discussed in the next section. However, it is employed here because it is a term that is widely used specifically to describe intercultural contact in situations of relocation and temporary expatriation. The different types of intercultural contact are described in 3.3.2 below and the specific group under study in this research project is identified and described in function of the typology outlined in that section.

3.2.5.1 Early models of culture shock

The concept of “culture shock” was developed by Oberg in relation to expatriate sojourners (Oberg, 1960), which was characterised by heightened levels of depression, linked to “culture loss”, and anxiety, linked to uncertainty about how to live in a new society. Four distinct phases were described: *Honeymoon* (initial feelings of enchantment with the new environment); *crisis* (frustration, anger, inadequacy); *recovery* (culture learning); and, finally, *adjustment* to the new cultural milieu. Related to this is Lysgaard’s (1955) “U-curve hypothesis”, dictated by the four stages, in which levels of stress decreased over time.

However, while there is little evidence of a standard, four-stage approach for every person's experience, refuted, for example, by Church as "weak, inconclusive and overgeneralised" (Church, 1982, p. 542), there is increasing recognition that expatriates who undertake international assignments in new and unfamiliar environments can experience stress, which may lead to the failure of the assignment and premature return to the sojourner's homeland (Church, 1982; Berry, 2006; Ward et al, 2001; Black and Gregerson, 1999; Hechanova et al, 2003). Berry, for example, prefers the term "acculturative stress", rather than "culture shock", in order to place new cultural experiences within a psychological framework. He refers back to his strategies model to hypothesise that greater stress is involved in marginalisation and segregation, as opposed to, for example, assimilation and integration. This model allows for positive as well as negative experiences (unlike the "shock" notion) and for an "interactive" approach, where the source of anxiety is not rooted in one problematic "culture", but in the process of experiencing a new cultural environment (Berry, 2006).

Other theorists make a distinction in "cross-cultural transition" (Kim, 2001) between "adjustment" and "adaptation", seeing the former as "a cyclical and recursive process of overcoming obstacles and solving problems" (Anderson, 1994, p. 293) and the latter more as a "continuum" or transition of "working one's way into a culture" over time (ibid), depicted by the notion of a state of arrival or "intercultural personhood" (Kim, 2001) in which an individual undergoes an "intercultural transformation" (ibid). However, the two terms are not always distinguished and are often used interchangeably, particularly in the area of "expatriate adjustment" (Aycan, 1997; Ward et al, 2001), with reference to a wide range of processes, including "a feeling of acceptance and satisfaction", "acquisition of culturally acceptable skills and behaviours", "interaction with host nationals" and the absence of "stress or depression" (Aycan, 1997, p. 436). In recent work on international students, however, a more transformational focus is seen to be appropriate (Pitts, 2009), possibly because of the potential "identity shift" (ibid, p. 452) and life changing experience of undertaking academic study in a foreign country. In this study, the approach is to follow most literature and treat "adjustment" as a process conceptualised as "the degree of fit between the expatriate manager and the new environment", marked by "reduced conflict and stress and increased effectiveness" (Aycan 1997, p. 436). In

this sense, “adjustment” tends to focus more on process, while “adaptation” is seen more as an outcome over time, resulting in deeper integration into the new environment (Ward et al, 2001), although the distinction is not always that rigorous or consistent in the adjustment literature. In this study, because of the segregated nature of sojourner life in Cuba, I will focus more on adjustive processes, rather than adaptive outcomes, as part of a continuum towards sociocultural adaptation, which I would consider rare amongst foreign residents in Cuba.

3.2.5.2 Multidimensional approaches

Black et al (1991) argue that cross-cultural adjustment should be treated as a multidimensional concept, rather than a unitary phenomenon suggested by early models of cross-cultural adaptation, such as the U-curve adjustment (Lysgaard, 1955), and culture shock (Oberg, 1960). Black et al (1991) describe adjustment as having three dimensions: adjustment to work requirements or “work adjustment”, adjustment to interacting with individuals in the foreign country, labelled “interaction adjustment”, and adjustment to the general living conditions of the new environment or “general living adjustment”. This theoretical framework introduces the sociocultural dimensions of adjustment to include a situational element or “domains” of adjustment where individuals meet different challenges. Adjustment at work, for example, entails adjustment to the way in which people approach areas such as leadership, task achievement, performance management and so on, while outside work adjustment entails building social networks and learning how to thrive in unfamiliar surroundings. This multi-dimensional approach to adjustment, which has been supported by a series of empirical studies of US expatriates and their spouses (Black and Stephens, 1989; Black and Gregersen, 1990; 1991; Black et al, 1991; McEvoy and Parker, 1995; Hechanova et al., 2003), goes beyond the workplace and affects the employee’s spouse and family.

3.2.5.3 The ABC model of culture shock

Ward et al (2001) develop a model for sojourner adjustment, or “culture shock”, by taking into account and fusing together three main traditions in acculturation research. These are described as:

1. *Culture learning approach*. This approach originates from the field of social psychology and focuses on the social skills and behaviour required for operating

successfully in a new cultural environment (Argyle, 1980). Factors such as knowledge of language and cultural norms, social networking, “culture distance”, or “dissimilarities between culture of origin and culture of contact” (Ward et al, 2001, p. 95), previous experience abroad, length of residence and cross-cultural training are considered to influence adaptation and are subject to a learning process.

2. *Stress and coping approach.* This approach conceptualises cross-cultural transition as a *psychological* process “a series of stress-provoking life changes that draw adjustive resources and require coping responses” (Ward et al, 2001, p. 37). In this sense, moving to a new environment is considered a stressful process similar to other life changes, such as moving house or changing job and factors such as personality, individual coping styles, locus of control, tolerance of ambiguity, feelings of homesickness and loneliness, sense of loss, and degree of social support are considered important in the adaptation process.
3. *Social identification theories.* This approach focuses on cognitive factors such as identity theory and abilities that can be psychometrically tested in order to see how adaptation occurs. This differs from “culture learning” in that it focuses on traits rather than learning processes.

With this analysis, Ward and colleagues, whose research focuses mainly on sojourners, rather than immigrants or refugees, maintain that intercultural adjustment or adaptation can be seen on two levels: the *psychological* level and the *sociocultural* level, explained thus,

Psychological adjustment, based predominantly on affective responses, refers to feelings of well-being or satisfaction during cross-cultural transition. Sociocultural adaptation, on the other hand, is situated within the behavioural domain and refers to the ability to “fit-in” or execute effective interactions in a new cultural milieu.

(Ward et al, 2001, p. 42)

Searle and Ward (1990) found that while the two forms of adjustment or adaptation are interrelated, they are primarily predicted by different types of variables.

Psychological adjustment, for example, depends on personality factors, such as extroversion, a strong coping ability and internal locus of control, and the amount of

satisfactory intimate social contact or social support, particularly with fellow nationals or close colleagues, in the earliest stages of expatriation. The difficulties associated with an extreme life change means that psychological adjustment is more variable over time and the greatest difficulties are experienced at the earliest stages of cross-cultural transition (Ward and Kennedy, 1999). On the other hand, sociocultural adjustment depends much more on behavioural factors that influence culture learning and social skills acquisition, such as language learning ability, relevant to the new environment. In this sense, it can be argued that sociocultural adjustment may improve as a result of length of residence and the amount of interaction and identification with host nationals, as well as positive attitudes to the host environment. Culture distance is seen as an impediment to sociocultural adjustment, and other factors, such as previous cross-cultural experience and cross-cultural training, as having an influence on successful adaptation over time (Searle and Ward, 1990; Ward and Kennedy, 1999).

From this, they devise a model of “culture shock”, which distinguishes three components (the ABC model”):

Affect, Behaviour and Cognitions, that is, how people feel, behave, think and perceive when exposed to second-culture influences.

(Ward et al, 2001, p. 268)

The *affective* component resembles the original concept of “culture shock” as “a buzzing confusion” (Oberg, 1960) in an unfamiliar environment, which motivated clinical models of extreme behavioural responses such as “confusion, anxiety, disorientation, suspicion, bewilderment, perplexity, and an intense desire to be elsewhere” (Ward et al, 2001, p.270). In this sense, the focus is very much on the psychological adjustive process, although approaches drawn from stress and coping research have highlighted factors that can cause or reduce stress, such as companionship and social support (Ong and Ward, 2005).

The *behavioural* aspect of the model is associated with the process of culture learning and social skills required for adaption to a new cultural environment, which include the discourse and behavioural norms that govern communication, social behaviour and interaction. This approach focuses on processes associated with

cultural skills acquisition and sociocultural adaptive processes, as well as on social support for people entering new environments.

The third component of the model is *cognitive* and focuses on such areas as beliefs and worldview and the way people “interpret material, interpersonal, institutional, existential and spiritual events as cultural manifestations, and these vary across cultures” (Ward et al, 2001, p. 271). Cultural identity, attitudes to age, gender, sexuality, and such are factors that contribute to how societies are structured and organised and to how social policy and attitudes to “others” are formed both within and between societies.

Ward et al (2001) propose this model as integrated in which the three components are interrelated:

It integrates both stress and coping and culture learning perspectives on acculturation, distinguishes psychological and sociocultural domains of adaptation and incorporates a range of micro and macro level variables, including social identity, as predictors of the adjustive outcomes... On the macro level characteristics of the society of settlement and the society of origin are likely to be important... On the micro level characteristics of the person and the situation may prove to be important. This may include factors such as language competence, personality, cultural identity and acculturation strategies on the one hand and friendship networks, cultural distance, intergroup relations or social support on the other.

(Ward et al, 2001, p. 43-4)

While this model of culture shock incorporates a comprehensive range of research traditions and approaches and brings into view different levels of influences on behaviour in unfamiliar environments, its main underlying assumption is that “culture contact” is seen as problematic in that it seeks to explore “how an individual perceives and makes judgements about other members of other ethnic, cultural or national groups” (ibid, p. 2)., and, therefore, assumes that there are essential and immutable characteristics to such groups. Furthermore, some of the building blocks of the model, such as “culture distance”, “culture contact” or “culture learning” assume that individuals undertake some sort of a psychological journey from their “culture” towards another “culture”, and can possibly neglect the underlying

intercultural processes that are involved in creating shared understanding. Certainly, as we have seen, there is little doubt that within any societal or administrative territory there will be given and accepted ways of doing things, embodied in institutions, practices, laws, norms and so on, and many of these will be unfamiliar to a newcomer. However, as we have also seen, social interaction in a given situation is influenced by a complex range of processes which elude permanency or embodiment to be able to describe essential characteristics and it is these influences and processes that should be the object of study within a given context.

In this sense, a focus on cultural difference can serve to obscure inequality and injustice, which can serve to justify colonial and neo-colonial relationships in the form of “culturism” (Piller, 2007).

As explicit racism has largely become unspeakable in mainstream North America and Europe..., invoking ‘their culture’ has often served to cloak discrimination. Conversely, minority groups may actually rally around cultural identity in order to escape being racially framed, as is, for instance, the case for the Indian community in the USA which has worked hard to present themselves as a distinct cultural group (e.g. by forming religious and cultural associations), so as not to be seen as Black Americans, and to escape racial discrimination.

(Piller 2007, p. 219)

Piller’s point is that discourses of “cultural difference” are not really about “culture”, but more a means of obscuring relationships of inequality and power. In this sense, “a critical study of Intercultural Communication needs to ask who makes culture relevant to whom, how, in which context and for which purposes?” (Piller, 2007, p. 219)

3.2.5.4 Recent approaches to “adjustment”

Later models of adjustment return to the notion of, and build on, Black et al’s (1991) work of sociocultural domains of adjustment. Haslberger and Brewster (2008), for example, in their research on the “expatriate family” make the point that the domains are not isolated or independent from each other and “spillover” takes place from one domain into another. Besides this, “crossover” may occur between individuals, either “cutting across domains” in which, for example, the expatriate’s work adjustment impacts on the partner’s adjustment to family life, or affects the same domain in both

individuals, such as, for example, the partner's adjustment to social relations influencing the expatriate employee's adjustment to social relations (Haslberger and Brewster, 2008, p. 327). It has been argued elsewhere that the boundaries between life domains are more permeable for those involved in relocation than for those with comparable domestic assignments (Harvey 1985; Luring and Selmer, 2009), possibly because of the level of change in all aspects of a family's life. In a new environment, for example, where individual family members are trying to adjust to a new job, a new home and a new school all at the same time, as well as building new social and friendship networks, the boundaries between home and work can become blurred due to the involvement of the whole family in the change process and where there is not a clear sanctuary in one domain from the stress experienced in another domain. Haslberger and Brewster (2008) describe how a domain model can also incorporate stress theory:

The Family Adjustment and Adaptation Response model... looks at the outcomes of a balancing process between demands on the family and its capabilities to cope with the demands. The process is mediated and moderated by the meanings the family attaches to its current and general situation. If the family's capabilities suffice to answer the demands, adjustment takes place. If they are not enough, demands pile up and the family eventually slides into a crisis.

(Haslberger and Brewster, 2008, p. 328)

The main sources of "demands" are classified as "stressors", or "discrete events such as a move abroad", "strains", or "ongoing unresolved tensions as a result of a stressor or of not meeting demands", and "daily hassles", such as "troubles with neighbors, traffic problems, or weather experienced as unpleasant". "Demands" trigger the application of "resources", whether as individual attributes or in the form of family or social support, and "coping behaviors", whether "problem-focused" or "emotion-focused", which is essentially a "cognitive adjustment process" with affective and behavioural consequences (Haslberger and Brewster, 2008, p. 328). Furthermore, the balancing of demands against resources and coping behaviours is influenced by how family members attribute "meanings" to their new situation and how they try to make sense of their new cultural environment through the interpretation of current demands and current capabilities. This is a short term adjustment, but it is rooted in longer-term meanings, which include,

...the commitment of members to a common purpose, goals and values, the affective climate or optimism of the family as a unit, the extent to which the family sees itself and its circumstances as changeable or fixed, whether it sees itself as isolated or integrated into a larger whole, and, finally, to what extent it is willing to share control and trust those outside the family. Families are continuously engaged in the balancing of demands against capabilities. Adjustment is a process; sometimes a pile-up of demands overwhelms capabilities, resulting in a crisis and a subsequent need to adapt. Failure to adapt would result in dissolution of the family.

(Haslberger and Brewster, 2008, p. 329)

Thus, we may have a situation where a couple arrive at a new location and do not have a car to get to work, take the children to school or to go on an excursion. This may create a feeling of tension or stress and can be defined as the “stressor”, or cause of the stress. This may remain unresolved for several weeks and becomes a strain for all members of the family, who are confronted with the daily hassles of having to find a lift or take overcrowded and unreliable public transport in a hot and humid climate. Resources to cope with this may include a positive attitude and a sense of humour, a persuasive and congenial member of the family who arranges for daily lifts for all the family, or company support in providing daily transport and so on. It is not difficult to imagine how this stressor in the general living domain could spill over into stress in the work domain, or how one member of the family’s feeling of stress can cross over to another member, and so on.

Subsequent research has developed Black et al’s model further, simplifying it into two domains, “work” and “non-work”, on the grounds that “interaction” occurs with host country nationals both within the workplace and within the general environment and is, therefore, conceptually redundant (Shaffer & Harrison, 1998; Takeuchi et al, 2005). Likewise, some individuals operate in both domains – employees have a family life and a social life, for example, while spouses often have work-related roles in that they may accompany the expatriate employee to a variety of work functions and so on. Lazarova et al (2010) take this further and propose a model of adjustment based on a person’s role (“role adjustment”), whether at work (“work role adjustment”), at home (“family role adjustment”) or in social life (“cultural adjustment”), all involving interaction in different domains. A key point here is that expatriate assignments can have a huge impact on individual roles, particularly if one individual has had to give up work or put their career on hold, or if a new job in a new

environment creates substantial new challenges. The impact of an “overnight identity transformation from a journalist with a promising television career to a single parent without dating privileges” (Pascoe, 2003, p. 103) is close to reality for many spouses, for example, and this can affect the nature of adjustment for all family members and the success of an overseas assignment (Harvey, 1998).

In summary, while adjustment to a new environment depends on a wide range of individual and contextual factors, we can broadly say that, apart from adapting to the physical environment, there is both a psychological and a sociocultural dimension to the process of adjustment and most current models recognise this distinction. Individuals may need to adjust to different domains of their environment, whether at work or outside work, and may have to adjust to a new role with new expectations, but a distinction can be made as to how much at ease they feel psychologically, or the “degree of fit” they experience with their new environment (Aycan, 1997), on the one hand, and how well they “fit in” or acquire culturally appropriate skills to negotiate interactive aspects of the host context, on the other (Ward and Kennedy, 1999). While these two dimensions are related (Ward and Kennedy, 1999), there are many examples of expatriates being psychologically adjusted, or at ease with their new life overseas, but this may not necessarily entail contact with or adjustment to the host culture. Successful adjustment, then, will depend on a wide variety of factors, and much of the expatriate research literature seeks to understand what facilitates the process in an attempt to inform recruitment agencies and minimise risk in sending expatriate employees and their families overseas.

3.2.5.5 Towards a model of cultural shock for international sojourns

The notion of “culture shock” used in this study, then, takes into account “the degree of fit between the expatriate manager and the environment...marked by both reduced conflict and increased effectiveness” (Aycan, 1997, p. 434), expressed in recent research, but also focuses on social interaction in context and the way sojourners negotiate their way through and construct their new social environment. “Culture shock” is seen as a dynamic, discourse-based concept, created through universal cultural processes and influenced by contextual factors which influence sociocultural behaviour, rather than a set of immutable processes, qualities or characteristics of a given group of people based on national or cultural stereotypes in a given context. This is not to deny that there are identifiable cultural practices and products that have

emerged in the local way of life, including customs, norms, beliefs, values and so on, but there are many levels of discourse, whether dominant or demotic (Baumann, 1996), particularly when there are new entrants into the situation with their own personal trajectories and cultural realities (Holliday, 2013). Likewise, it is recognised that there are many types, domains and levels of adjustment, which belies a one-dimensional definition and which is subject to variability, influenced by individual and situational factors. This is explored in detail in the accounts of individuals presented in Chapter 5: Presentation of Data and a model for culture shock is described in the final chapter, Chapter 6: Discussion of Key Findings.

3.3 International Expatriate adjustment research

3.3.1 Introduction

Much of the earlier work on cross cultural adjustment was related to how immigrants settled into their new environment and how they coped with a new way of life. Berry (1997) describes how individuals go through a process of “adaptation”, which “refers to changes that take place in individuals or groups in response to environmental demands” (Berry, 1997: 13) and which involves “behavioural shifts”, such as “culture learning”, “social skills acquisition”, “culture shedding” (i.e. “the unlearning of aspects of one’s previous repertoire that are no longer appropriate”) and “culture conflict” (i.e. “where incompatible behaviours create conflict for the individual”) (Berry, 1997, p.13). Berry and colleagues develop this through the concept of “psychological acculturation”, proposing a two dimensional model based on “maintenance of original cultural identity” and “maintenance of relations with other groups” (Berry and Kim, 1988). According to this model, four approaches or “acculturation strategies” can be identified: assimilation, separation, integration and marginalisation. Groups that wish to maintain only their original cultural identity will separate themselves from society, while those that value both their own identity and relations with society will integrate, and those that do not value their identity but value relations with others will be assimilated. Marginalised groups emerge where neither the original identity nor relations with others has value.

However, as Berry later points out, there is an assumption in this model that “groups and their individual members have the freedom to choose how they want to acculturate” (Berry, 2005, p. 705), which, as Berry recognises, is not always the case.

For this reason, he develops the model further to incorporate responsiveness of societies to immigrant groups, contending that:

Assimilation, when sought by the dominant group, is termed “melting pot”. When separation is forced by the dominant group it is called “segregation”. Marginalization, when imposed by the dominant group, is called “exclusion”. Finally integration, when diversity is an accepted feature of the society as a whole, including all the various ethnocultural groups, is called “multiculturalism”.

Berry (2005, p.706)

In this sense, the strategy adopted by non-dominant groups in larger societies, to a large extent, depends on the policy adopted by the host society towards cultural diversity and its openness towards adapting its values and institutions to accommodate alternative ways of living. This model has some relevance to the situation of sojourners in Cuba and the policy of the Cuban authority towards the presence of foreign residents within the midst of its social revolution, which has become a growing phenomenon since the opening up required as a response to the “Special Period”. That is to say that, while, on the one hand, as pointed out in 2.5.3.8, expatriates in Cuba could not be likened to a migrant community in the sense that Berry had in mind, on the other, the cautious and vigilant approach adopted by the Cuban government towards sojourners for protective reasons has essentially engendered segregation in the way they experience everyday life.

3.3.2 The nature of intercultural contact

Migration and contact with newcomers can be motivated by a number of factors, whether economic, political or social. It may be forced, as with refugees, or voluntary, as with tourists or international business people, or it may be short term, as with tourism, or long term, as with migrants. Bochner (1982) uses a framework to describe the dimensions of “cultural contact” distinguishing between contact “between members of different societies” and those of the “same society” and using “time-span”, “purpose” and “type of involvement” as factors in determining examples of group membership. Building on these dimensions, Ward et al (2001), categorise the different groups and situations that characterise cross cultural contact:

1. *Tourists*: These are visitors “whose length of stay exceeds 24 hours in a location away from home and whose main incentive for travel is other than financial” (Ward et al, 2001:19).
2. *Sojourners*: “A sojourn is a temporary stay and, therefore, a sojourner a temporary resident” who travels abroad voluntarily for a set period of time and who expects to return home after the completion of a specific assignment (Ward et al, 2001:21). This can include volunteers, international students, business people, military personnel, diplomats, missionaries and so on and usually involves a period of time of a year or more.
3. *Immigrants*: Immigrants are also a growing and diverse group, subject to socio-economic and political push-pull factors and complex acculturation processes affected by identity and host society attitudes
4. *Refugees*: Similar to immigrants, but whose adjustment to a new cultural environment is normally involuntary and a result of circumstances.

Sojourners, by definition, come into contact with a new cultural environment for only a limited period of time and most return home after their assignment is completed. The experience is usually voluntary and can be stimulating for many, although the transition to an unfamiliar environment can also result in emotional problems that can affect professional or educational performance and, in extreme cases, family or relationship problems or premature departure from the assignment (Aycan, 1997). While the problems faced by sojourners and their families are maybe not as life changing as those faced by immigrants or refugees, a tangible real financial and emotional cost can be associated with early repatriation or an unsuccessful posting.

As described in 2.5.3.8, the sojourners in this study are essentially in Cuba on a voluntary basis and, in general, not there permanently. While a number of sojourners do marry locally and build a family and business within Cuba, they are generally segregated from mainstream Cuban society and institutions, in that they are required to access specific key services and facilities dedicated to foreign residents by the Cuban authorities (including healthcare, schooling, currency, and so on) and are subject to specific forms of monitoring and restrictions as part of their status. Access and control within Cuban society, as we have seen in 2.5.4.7, can differ amongst sojourners according to their official visa status, whether as a tourist, an official visitor, a business sojourner, a journalist or on a diplomatic posting and so on, which

includes a range of differing benefits and restrictions associated with each category. We shall explore the experiences of sojourners in Cuba in Chapter 5 and build an ethnographic picture of how they adjust to their life in that context.

3.3.3 Individual factors in expatriate adjustment

3.3.3.1 Introduction

The reason for the variation in successful adjustment amongst individuals has been the object of research for some time and examining the process of expatriate adjustment is considered important for a number of reasons. Issues such as the failure rates of international assignments, factors influencing a successful sojourn, gender differences and so on, have dominated much of the recent research in international human resource or management journals in order to understand the challenges surrounding the employment of internationally mobile professionals that spend a “sojourn” away from their host country in a foreign country.

A major issue is the rate and cost of repatriation as a result of expatriate “failure”, often quoted as considerable, ranging between 16% and 40%, while the cost has been put at some \$1 million. This is summarised in Shaffer et al (1999):

Expatriates represent a major investment for multinational corporations. It has been estimated that the first-year costs of sending expatriates on foreign assignments are at least three times the base salaries of their domestic counterparts... Sixteen to forty percent of assignments end in failure..., and costs have risen from as much as \$250,000 a decade ago... to \$1 million per failure for U.S. firms today...

(Shaffer et al, 1999, p. 557)

While this seems an extremely high price to pay for international mobility (although Shaffer is referring to highly qualified professional expatriates, rather than labourers), many of the figures have been contested and reviewed to the extent that “there is virtually no agreement about the incidence of expatriate failure rates among academic researchers” (Forster, 1997, p. 415). Most figures are for US companies, but this latter article breaks down the figures for UK companies:

...around 8 per cent of UK employees actually return home early, some 15-20 per cent of employees report considerable initial difficulties in adapting to an IA [international assignment], one in six families report negative outcomes to

international assignments and many repatriates have concerns about their return to the UK.

(Forster, 1997, p. 429)

Clearly, not all return home, but many indicate dissatisfaction or difficulty with the adjustment process and psychological and sociocultural aspects can take on a new dimension, leading to maladjustment and unhappiness (De Cieri et al, 1991; Black and Gregerson, 1999). This section explores some of the factors that, according to research, can facilitate or hinder a successful sojourn.

3.3.3.2 Cultural differences

The notion of “culture distance” has been used to explain and predict differing levels of satisfaction and adjustment amongst sojourners. Church (1982), for example, mentions “nationality” and “cultural distance” as an “important variable” in that “adjustment will be more difficult for visitors coming from home cultures that are very different from the host culture”, such as “the Far East” (Church, 1982, p. 547). As well as being a seemingly intuitive notion, this theme has been developed and researched fairly extensively over the years. Torbiorn (1982), for example, concluded that Swedish expatriates based in Europe had fewer difficulties than those in Africa because of the cultural similarity of European cultures, while Furnham and Bochner (1982) concluded that “the greater the distance between the host society and the sojourner’s culture, the greater the degree of difficulty in negotiating everyday situations (p.190). Likewise, Dunbar (1994) compared the experiences of German managers in the United States with those of their American counterparts in Japan and concluded that doing business in familiar cultural environments was considered easier and more satisfying. From this, he identified “culturally easy” environments for work adjustment, such as the United States, compared to more “difficult” environments, such as Japan (Torbiorn, 1982, p. 287).

However, as we have seen above, nationality and culture are not synonymous, quite apart from the inherent difficulty in defining what “a culture” might be, and it is no surprise that more recent research has challenged the absolute notions of “tough” and “easy” cultures (Church, 1982, p.560), or of “culture distance” or “similarities in religion, language and climate” (Furnham and Bochner, 1982, p.182) or “culture novelty” (Black et al, 1991). Furthermore, research based on self-reporting, for

example through a “Culture Distance Index” (Mumford, 1998), tends to mobilise stereotypical images of what “a culture” is and it may be that the stress of adjusting to a new environment is not actually caused by culture novelty, but just attributed to it. Maybe there are other factors that cause distress – being away from “home”, physical discomfort, language problems and so on. Selmer and Shiu (1999), for example, found that expatriate managers and their spouses from Hong Kong did not adjust well to working in the People’s Republic of China, despite the apparent similarity of the culture, while Selmer and Luring (2009), more recently, have challenged the “confirmation bias” in research for the basic assumptions of cultural similarity:

In most of the extant body of theory and research on business expatriates, there seems to be an assumption, largely taken for granted as it has seldom been tested, that the more different the host culture appears from the expatriate’s own culture, the more difficult the process of adjustment will be. In other words, cultural similarity will facilitate expatriate adjustment.

Selmer and Luring (2009, p.429)

On the contrary, this research project found that “perceived cultural similarity could be as difficult to adjust to as perceived cultural dissimilarity” (Selmer and Luring, 2009, p. 434), because of the pressures on people to conform to a type of behaviour dictated by stereotypical notions of culture and nationality.

In order to illustrate problematic areas of different cultural perspectives, Ward et al (2001), list a number of “North-American derived assumptions about work-related human nature” that have proved difficult to apply in other cultural settings. These include:

- Preferences for a consultative leadership style rather than top down decision-making
- Egalitarian interpersonal relationships between employees of different seniority
- Emphasis on task achievement rather than harmonious relationship maintenance
- Use of direct performance feedback which challenges face maintenance
- Individual praise and reward rather than collective
- Taking a rational, objective approach to issues and ignoring emotion
- Selecting and recruiting based on merit rather than personal contact

- Operating on explicit contractual arrangements rather than a “psychological” contract

(Ward et al, 2001, p.170)

While it is difficult to know whether misunderstandings around these themes are “cultural”, as such, there are often differences in expectations in given situations, which can lead to conflict and which can undermine an expatriate manager’s technical competence and performance. Different rhetorical styles and discourse systems can also be a source of miscommunication in business (Clyne, 1994; Scollon and Scollon, 2001) and the inability to adapt to different leadership styles and human resource practices may provoke dissatisfaction and a desire to repatriate.

Overall, then, there is both theoretical confusion and contradictory evidence for the notions of cultural similarity and culture distance. Thus, while adjusting to an unfamiliar environment, where differences in language, religion, social norms, climate, diet and such may present considerable challenges and difficulties, it is far from clear that they are based in differences in “national cultures”. As a result, it may be more fruitful to look at the situational and interactive challenges that an unfamiliar environment presents for individuals.

3.3.3.3 Individual differences

Another approach to success factors in adjusting to unfamiliar environments is to explore whether certain individuals have more propensity to adapt, whether as a result of factors such as age and gender, or a particular personality type and so on.

Early studies were fairly speculative about the relationship between individual or national characteristics and work success abroad. Church (1982), for example, proposed that more mature expatriates may adjust better to other cultures, while Black & Stephens (1989) noted that Americans failed more frequently than others in international assignments, resulting in poor work performance or early repatriation. Likewise, Cort and King, (1979) predicted that prior international experience and maturity would aid adjustment, while Mendenhall & Oddou (1985) suggested that relationship skills are important for interaction with host country nationals and proposed that, as women were more skilled in this area, there may be a relationship between gender and interaction adjustment. Parker and McEvoy (1993), too, in a

comprehensive review of literature cite personality characteristics, such as open mindedness, cultural empathy, creativity, sense of humour, integrity, sincerity, stress tolerance and extroversion as possible defining factors in successful adjustment. In particular, they see the personality trait of extroversion, as positively related to sociability and interpersonal involvement, and, consequently, a likely contributor to adjustment overseas.

A study by Harrison et al (1996) found that factors such as “self-efficacy” and “self-monitoring” had a positive correlation with adjustment to a new environment. Self-efficacy is defined as “the level of confidence that individuals have in their ability to accomplish tasks” (Harrison et al 1996, p. 167) and individuals with high self-efficacy were found to be more likely to experiment with new behaviours, such as speaking a foreign language, and receive feedback about their acquired skills than those with low self-efficacy. Likewise, high self-monitors were found to be adaptable in their behaviour depending on the requirements of a certain situation, while low self-monitors tended to maintain their behaviour and remained unable to adapt to new challenges.

In another study, Aycan (1997) proposed that certain relationship skills, such as “cultural flexibility” and “conflict resolution skills”, and personality traits, such as “extroversion” and “agreeableness”, are related to success in adjustment on international assignment. Cultural flexibility is seen to help an individual adjust by reducing stress and facilitating learning, whether by finding new activities to substitute activities enjoyed in the home country, or by being willing to change one’s behaviour patterns to suit the local context, or by remaining non-judgemental about the new way of life. This related to a previous study by Ruben and Kealey (1979) who had found that “the most important set of behaviours related to success in international assignments were being flexible, sensitive, respectful and non-judgemental” (Aycan, 1997, p. 441).

While Aycan’s (1997) article was primarily a proposal for research, Huang et al (2005) investigated the relationship between the “Big Five personality traits” (extroversion, agreeableness, conscientiousness, neuroticism and openness to experience) to adjustment amongst US expatriates in Taiwan. The study found that three traits, “extroversion” (a tendency to be outgoing and sociable), “agreeableness”

(a tendency to seek acceptance and contact in new situations) and “openness to experience” (a tendency towards an interest in learning and fewer stereotypes and false expectations while entering a new environment) were positively related to different aspects of adjustment. In a previous study, Leong et al (2000) found that neuroticism (a tendency towards emotional instability) was strongly related to adjustment problems, while extroversion, agreeableness and conscientiousness (a tendency towards determination and hard work) were only weakly related to psychological adjustment.

Other studies have identified other personal characteristics associated with the way people adjust to a new environment. Cort and King, (1979), for example, identified “external locus of control” (the tendency to identify the cause of events in life as being due to external forces beyond one’s control) and “intolerance of ambiguity” (the tendency to perceive ambiguous situations as threatening) as key precursors to hostility towards the host culture, leading to withdrawal or excessive identification with the home culture. Subsequent studies have linked an external locus of control with psychological and emotional disturbance as the feeling of loss of control over an environment can lead to depression (Ward et al, 2001). Likewise, Cross (1995), distinguished between “primary coping strategies”, which are behavioural and direct, task-oriented actions designed to change unwanted things in the environment, and “secondary strategies”, which are more cognitive and involve adapting perceptions and expectations to the environment.

Another factor, the “theory of met expectations”, according to Caligiuri et al (2001), proposes that the closer an individual’s expectations are to the reality of the new environment, the easier it will be for the individual to adjust and pre-departure training should be tailored to the needs of the forthcoming assignment. They warn that:

Expatriates create their expectations of the host country prior to leaving their home country. If expatriates have insufficient or ambiguous information about the host country, they will use mental short cuts, such as stereotypes, to create expectations about it.

(Caligiuri et al, 2001, p. 360)

In this sense, stereotyping could cause expatriates to categorize all host nationals on the basis of their nationality, for example, and, while stereotypes can be useful for processing information in a situation of uncertainty, they can also create expectations which, if based on limited or false information, can feed prejudices towards the new environment, whether by perceiving things as alien or exotic (Holliday et al, 2004, p. 59).

Overall, then, the panorama of possible factors that can influence an individual's sense of wellbeing and comfort in an unfamiliar environment is quite vast, and robust conclusions are few and far between. As Ward et al (2001) point out:

Despite extensive theorising...relatively few investigations have empirically documented the influence of personality traits on the psychological well-being of immigrants, refugees or sojourners.

(Ward et al, 2001, p.83)

Furthermore, Searle and Ward (1990), for example, challenge the notion that extroversion is a positive characteristic in cultures that are more reserved and, as we will see in the following sections, many other factors may come into view as a result of circumstances, such as the particular difficulties of the local situation, including the local language, the level of resources and support available to individuals and an individual's personal and family situation. The complexity of the adjustment process means that the individual's response to it is likely to rely on a combination of factors and events over a period of time, rather than one or two particular characteristics.

3.3.3.4 Intercultural competence

Over and above the role of possible personality traits in adjustment, some studies suggest the notion of developing a specific "intercultural competence" for intercultural communication. Gudykunst (1994), for example, proposes a *psychological* model of intercultural competence, which recognises the need for a range of motivational conditions, including security, predictability, group inclusion, anxiety avoidance, common ground, preservation of self-concept and so on for successful communication. Knowledge of how to gather information, understanding differences and interpreting information are also important, together with a range of skills to reduce uncertainty and anxiety.

Likewise, other studies pinpoint motivation as a key component of successful intercultural communication. For example:

Factors such as anxiety, perceived social distance, attraction, ethnocentrism, and prejudice can influence an individual's decision to communicate with another. If our fears, dislikes, and anxieties predominate our affect toward the other, we will have negative motivation, and we will be likely to avoid the interaction, even if we feel we have the requisite knowledge and skills to perform.

(Wiseman, 2003, p.195)

In another approach, Kealey (1996) emphasises the use of “soft” or personal skills for effective intercultural communication, including “adaptation skills”, encompassing flexibility and tolerance of stress, “cross-cultural skills”, which ensure cultural sensitivity and facilitate participation in the host culture, and “partnership skills”, which allow openness and enable the development of good working relationships with people from different cultures. Likewise, Kim (2001) itemises a range of “competences” that make “intercultural personhood”, which focus on key areas such as tolerance for ambiguity, behavioural flexibility, empathy, sociability, being non-judgemental and so on.

In addition, a number of studies and methods have come out of the business world and the military field, in attempts to prepare professionals for forthcoming work in a competitive environment. Skills such as self-awareness, self-respect, interactions, empathy, adaptability, certainty, initiative and acceptance, as well as foreign language skills, are seen as essential for a transformation from “a monocultural person into a multicultural person”, with an emphasis on someone who “has tolerance for differences”(Jandt, 2007, p. 46). Other factors are understanding of verbal and non-verbal communication, ability to handle “culture shock” and an awareness of “customs” (ibid p. 47).

One major criticism that could be directed at these studies, however, is the tendency towards “otherisation” when describing other “cultures”, or equating “culture” with nationality or ethnicity (Holliday et al, 2004). For example:

Asian cultures view communication as communicators cooperating to make meaning. This model of communication reflects Confucian collectivist values because respecting the relationship through communication can be more important than the information exchanged.

(Jandt, 2007, p. 48)

While this view is not necessarily negative, it is a generalisation about people in “that culture”, which could inhibit a full understanding of an individual’s personal identity and own cultural trajectory. Thus, as pointed out in previous sections, typologies of behaviour and culture, while seemingly intuitively appealing, should be handled with care when developing awareness and competence in intercultural communication. As Holliday et al (2004) point out, we need to develop “thick descriptions” and a “non-essentialist” view of social phenomena in order to derive a broad and complex understanding of culture (Holliday et al, 2004, p. 48).

Bennett’s model of “intercultural sensitivity” addresses this in some way by encouraging tolerance of difference through greater experience of cultural difference and genuine interest in working with people from other countries. Individuals can then develop intercultural competence through contact and experience with different cultures, as long as they move away from an ethnocentric worldview and accept cultural differences as valid as their own (Bennett, 1993).

Many of the approaches to intercultural competence from the perspective of International Management Studies, however, pay little attention to *linguistic* competence or the value of knowing a foreign language in cross cultural transition (Piller, 1997). For many professionals that have worked across cultures, neglect of language and language skills, in particular, would be a flaw in any approach to intercultural communication. However, over and above linguistic knowledge, another possible factor in successful adjustment is the particular ability of individuals to interact culturally as a result of a “pragmatic” or “sociolinguistic” “competence”. For example,

The ability to negotiate cultural meanings and to execute appropriately effective communication behaviours that recognize the interactant’s multiple identities in a specific environment.

Chen and Starosta (1996)

In this sense, Byram (1997) makes a specific distinction between intercultural competence and intercultural *communicative* competence:

It is...possible to distinguish Intercultural Competence from Intercultural Communicative Competence. In the first case, individuals have the ability to interact in their own language with people from another country and culture, drawing upon their knowledge about intercultural communication, their attitudes of interest in otherness and their skills in interpreting, relating and discovering... On the other hand, someone with Intercultural Communicative Competence is able to interact with people from another country and culture in a foreign language... Their knowledge of another culture is linked to their language competence through their ability to use language appropriately – sociolinguistic and discourse competence – and their awareness of the specific meanings, values and connotations of the language.

Byram (1997, pp. 70-71)

Byram (1997) proposes a model of intercultural communicative competence by building on the six competences defined by van Ek (1986) in his model of “communicative ability”. These are described as:

Linguistic competence: the ability to produce and interpret meaningful language correctly in accordance with the rules of the language.

Sociolinguistic competence: the ability to see the relationship between linguistic signals and their contextual or situational meaning.

Discourse competence: the ability to construct and interpret a wide range of appropriate texts.

Strategic competence: the ability to use communication strategies in getting messages across or understanding what somebody means where there are gaps in linguistic knowledge or discourse cues.

Socio-cultural competence: the ability to perceive the meaning of linguistic signs and norms of behaviour within a particular social-cultural context.

Social competence: the ability to interact with others and the ability to handle social situations.

This builds on Canale and Swain’s (1980) more succinct definition of communicative competence, where they use only four components:

Grammatical competence: knowledge of words and rules

Sociolinguistic competence: knowledge of what is appropriate in a given context

Discourse competence: the ability to understand and use cohesion and coherence in discourse

Strategic competence: the ability to use appropriate communication strategies

Bachman (1990) reduces all of this into even fewer broad headings:

Organizational competence: grammatical and discourse (or textual) competence

Pragmatic competence: sociolinguistic competence, including use of "illocutionary" or performative (non-linguistic) acts (Austin, 1975).

Strategic Competence: ability to use "communication strategies".

Byram (1997) builds on these definitions further by including *non-verbal communication* into his model. His final model encompasses three levels or aspects of successful intercultural interaction, as in:

Attitudes (savoir etre): "curiosity", "openness", "readiness to suspend belief in one's own meanings and behaviours" and "disbelief and judgement in others" meanings and behaviours".

Knowledge (savoirs): "about social groups and their cultures and identities" in one's own and an interlocutor's country, including knowledge of history, geography, political and societal institutions etc., and both "declarative" and "procedural" knowledge "of interaction at individual and societal levels".

Skills: of "interpreting" and "identifying relationships" between texts or events from another country or culture (*savoir comprendre*), of "discovering" new meanings and behaviours (*savoir apprendre*) and of managing "interaction" by establishing relationships, managing dysfunctions and mediating in challenging circumstances (*savoir faire*).

Overall, then, these models offer ways of examining intercultural (communicative) competence and they are more analytical than predictive, though the more complex the model the more difficult it is to operationalise and measure. So, while such models seem conceptually appealing, no substantial empirical testing has been carried out to test their validity. Byram does devote a great deal of his work to indicating possible ways of testing the various attitudes, knowledge and skills

identified in his model, however, but the implications for curriculum design are quite considerable and could be reduced to quite general factors such as teaching the history and geography and traditions and customs of given nation states or “peoples”. As Precht and Lund (2009) concede: “Intercultural assessment is a complex process fraught with controversy” (Precht and Lund, 2009, p.478), and, more generally, “...there are many areas of debate around intercultural competence, including the extent to which it is possible to distinguish intercultural competence from intercultural communicative competence, and what the relationship of both is with linguistic competence” (Precht and Lund, 2009, p.468).

As a general conclusion, then, it would be true to say that successful communication goes some way beyond language itself and that it involves a range of social and psychological factors, abilities, types of knowledge and so on. In much of the literature, such as Gudykunst’s (1994) psychological model or Jandt’s (2007) military approach described above, knowledge of a foreign language as a success factor in intercultural competence is largely neglected, though it is hard to imagine that it would be anything but essential in most cases involving speakers of different languages. This may depend on the context and need, however. Shaffer and Harrison (1998), for example, found that language fluency was an important antecedent to the adjustment of spouses on international assignment, as they needed to interact with host country nationals on a regular basis while setting up home and taking care of their family. This is consistent with the findings in the expatriate adjustment literature (Black, 1988), in which language fluency is seen as a necessary tool for interaction with host nationals and a means of sociocultural adjustment, although Weeks et al (2010), describes how expatriate adolescents in China attending an international school downplayed the need for much more than basic Chinese and stressed the greater need for establishing friendship groups as soon as possible in a new environment. Likewise, as we shall see throughout Chapter 5: Presentation of Data, expatriates who do not interact with the local environment and who bury themselves in small-groups or enclaves, can also relegate the need for more than a basic knowledge of the local language, although the degree of sociocultural adaptation over time to the local environment can be quite limited and superficial.

3.3.3.5 Cross-cultural training

One success factor in adapting to a new environment is considered to be training which is aimed at facilitating effective cross-cultural interaction (Black & Mendenhall, 1990; Bochner, 1982; Tung, 1981). Although a growing commercial sector presents strong arguments for the use of cross-cultural training, it is estimated that only 30% of managers sent on expatriate assignments actually receive preparation (Black, 1988; Tung, 1981). This may be due, on the one hand, to doubts about the effectiveness of such programmes (Tung, 1981), while, according to Black and Mendenhall (1990), many companies believe that a manager who is effective at home, will also have the technical competence to perform well overseas. In a comprehensive review of the empirical literature on cross-cultural training, Black and Mendenhall (1990) conclude that there are many conflicting views among corporate leaders and academics on the effectiveness of cross-cultural training. Hammer (1999), for example is fairly convinced of its effectiveness:

In short, cross-cultural training has been shown to develop cross-cultural skills that affect subsequent success in an overseas assignment, improve expatriates' psychological comfort and satisfaction with living and working in a foreign culture, and improve task accomplishment in the cross-cultural environment.

Hammer (1999, p. 8)

However, Kealey and Protheroe (1996), in a comprehensive review of training, concluded that much of the research showed methodological weaknesses:

While this literature contains many insights, most studies have methodological weaknesses which make it impossible to take as definitive the general consensus of the literature that such training is effective.

Kealey and Protheroe (1996, p. 141)

This led them to conclude that the effectiveness of training was still in some doubt.

This survey of the literature suggests that the intercultural field has a challenge before it to establish more definitively whether intercultural training works, as well as to identify what kinds of training will work best in the varied and rapidly changing circumstances in which international collaboration takes place today.

Kealey and Protheroe (1996, p 162)

One of the issues here is the difficulty of teaching “pragmatics”, or sociolinguistic situations that require certain appropriate responses governed by norms and values. While it is possible to teach *about* pragmatics and raise awareness about ways in which people do things, there are no formulae that will help an individual cope with all the possible permutations of the situations they are likely to encounter. Thus, “cross-cultural training” tends to be quite general and can only be broadly defined as

...any intervention aimed at increasing the knowledge and skills of individuals, so as to help them cope better personally, work more effectively with others, and perform better professionally.

Kealey and Protheroe (1996, p. 141)

More specifically, these authors explain that intercultural training typically encompasses two broad sets of activities. The first, operating at the cognitive or intellectual level of the trainee, involves information briefings on general living conditions, political, economic, and cultural facts about the host country (“area studies”) and some “cultural awareness information” aimed at understanding the host culture. The second set, focusing on skills acquisition deemed necessary for the new culture, may involve experiential learning activities, such as role plays or simulations and whose aim is the acquisition of intercultural effectiveness skills, which are believed to enhance personal and family adjustment as well as work performance overseas. Such skills might include transition stress management, relationship building, cross-cultural communication, and negotiation techniques. They also mention “Interpersonal Sensitivity Training”, a technique used in training expatriates in the 1960s and 1970s in order to shift the attitudes and feelings of expatriate employees, though, as they explain, such methods have fallen by the wayside.

The idea was that trainees should first confront and come to know themselves in order to know and accept another culture. The method involved personal self-revelation within a group setting, with the aim of achieving personal growth and transformation. Since the 1970s such training methods have fallen into disfavour in the intercultural arena; by and large they are now regarded as personally intrusive, ethically arrogant (implying that failures of communication and adaptation abroad are mostly due to expatriates’ ethnocentrism etc.), and not very successful.

Kealey and Protheroe (1996, p. 147)

There is an important distinction to be made here between culture-*general* training and culture-*specific* training, or training “for specific contexts,” which is given considerable profile in Landis et al’s (2004) volume *Handbook of Intercultural Training*. This can be for specific countries or “cultures” or for specific activities, such as voluntary work or business, as well as, of course, specific languages, and can take the form of a culture “assimilator” or “sensitizer”, defined as “an instrument that comprises critical incidents, involving persons from the trainees’ culture and from the target culture, that resulted in a problem or a misunderstanding” (Fowler and Blohm, 2004, p. 67). In some respects, a culture specific approach seems intuitively sensible, given that new and unfamiliar environments can pose specific challenges. However, there is also a danger of basing discussions of typical situations on broad categories of analysis around national, cultural or ethnic stereotypes, which can reinforce ethnocentric attitudes. This can be seen very clearly in specific training provided commercially (often web-based), which relies largely on national or supposedly ethnic categories, such as “the Japanese” or people from “the Middle East”, as in the example in the extract in Figure 3.1 from the DFA Intercultural Global Solutions “Mexico culture quiz”, (which is available from their website at <http://www.deanfoosterassociates.com/learn-about-cultures/quiz/>).

<p>Q:</p> <p>You and your spouse arrive for the dinner party in Mexico City precisely at 8:00 p.m., just as the invitation said. But you are the first...and only...ones there! The hostess seems a little uncomfortable as she escorts you and your spouse in to the living room. You wonder, "When should I have arrived?"</p> <p>A:</p> <p>Precise timing is not as important as social graces. You should arrive between 20 and 30 minutes late for the dinner party (unless the point is made to begin "on time"), and you should not expect to leave until well after midnight.</p>

Figure 3.1 Mexico culture Quiz

Such approaches to alleged cultural sensitisation possibly do little more than to reinforce cultural stereotypes around nationalities or perceived ethnic categories and do fairly little to build an understanding of social behaviour. Clearly, there are differences in the way different groups of people live and interact socially in any given situation, but this needs to be seen as a dynamic and negotiated process, rather than a static, intrinsic quality related to arbitrary categories and attributing broad brush labels to entire populations is fraught with problems.

More recently, there has been growing awareness of the role of spouses and families in cross-cultural training programmes, in recognition that adjustment is not only about working overseas, but also about the challenge of adjusting to new living conditions, schooling and interacting with local people outside work. While the role of the spouse is becoming widely accepted as a crucial element in the adjustment of expatriate managers (Harvey, 1985), there is a lack of attention to pre-departure preparation and ongoing training and support (De Verthelyi, 1995; Punnet, 1997).

Overall, then, the field of cross-cultural training is a broad and growing one, intimately related to the notion of cross-cultural competence and a culture learning or skills acquisition approach, and ranging from the provision of information to intensive culture-specific simulations. The role and effectiveness of training as a success factor in facilitating cross-cultural adjustment, however, is still open to interpretation and fairly inconclusive, and it may be that other relevant factors, such as previous experience and language ability, play as much a part in adjustment as specific training (Shaffer et al, 1999).

3.3.3.6 Previous experience

Previous cross-cultural experience has generally been shown to be related to successful adjustment (Church, 1982; Searle and Ward, 1990). In a study by Brewster (1991), expatriates reported that having previous cross-cultural experiences helped them in the adjustment process in subsequent assignments, while Black et al (1991) found that, "Overall... previous overseas experience does seem to facilitate the adjustment process" Black et al (1991, p. 294). Previous experience has been found to help in a number of ways, from the formulation of realistic expectations about a forthcoming assignment, along with skills in coping with ambiguity (Searle and Ward, 1990; Weissman and Fumham, 1987), through to the ability to develop

local network support rather than relying on the home office (Shaffer et al, 1999). The relationship between previous cross-cultural experience and adjustment, however, according to Black, Gregersen and Mendenhall (1992) is moderated by two factors: the time gap between the previous and the present international assignment, and the nature of the previous assignment. Previous assignments in the immediate past and in similar cultural and work contexts prepare managers for the upcoming post better than those which took place a long time ago and in substantially different cultural and work settings.

The value of previous cross-cultural experience, then, is that it increases familiarity with international settings in general and with specific environments, in particular. It enables individuals to develop realistic expectations of what it is like to arrive in a new environment and allows them to gain experience and skills in setting up social networks and interacting with local people in order to seek support, companionship and comfort in a new setting.

3.3.4 Social interaction in adjustment

3.3.4.1 Introduction

How expatriates conduct their everyday social life and interact at work has been the subject of much research within the expatriate literature and is considered an important element in adjustment to a new environment (Church, 1982; Furnham and Bochner, 1982; Ward et al, 2001; Ward and Kennedy, 1999; Ward and Rana-Deuba, 2000). Much of the research on social interaction amongst expatriates comes from a “culture learning model” originally proposed by Bochner (1981), which maintains that:

...the major task facing a sojourner is not to adjust to a new culture, but to learn its salient characteristics. In particular, if the sojourner is to work effectively in the new setting, and lead a relatively stress-free and fulfilling life, the person must acquire the social skills of the host culture, especially knowledge necessary to negotiate everyday social encounters with members of the receiving society.

(Furnham and Bochner, 1982, p. 164)

Adjustment, then, is a process of learning the basic rules and routines of behaviour in the new society in order to survive and function normally:

Ordinary everyday situations such as attending parties, making contact with the opposite sex, ordering meals, shopping even using the bathroom, all activities which hitherto presented no problems, suddenly become major obstacles.

(Furnham and Bochner, 1982, p. 166)

This may be easier said than done, however, particularly where a foreign language is involved, or where there are considerable perceived “cultural” differences. As a result, it may be that individuals prefer to associate with people from the same language group, country or perceived social strata and avoid interaction with locals from unfamiliar social strata where possible. Church (1982) describes such groupings as “enclaves” which “allow the sojourner to...maintain familiar, traditional values and belief systems while minimizing psychological and behavioural adjustments” (Church, 1982, p. 551).

3.3.4.2 Social networks

Networks refer to the connections that individuals make with other people and groups in the course of their social existence. It is possible to identify “personal networks”, as Giddens describes,

Your personal networks...include people you know directly (such as your friends) as well as people you know indirectly (such as your friends' friends). Personal networks often include people of similar race, class, ethnicity and other types of social background, although there are exceptions.

(Giddens, 2009, p. 815)

Networks can be described in terms of more “closed”, where there is close or “tight” contact between the members and a high degree of “density” or number of interconnected links, or more “open”, where some members may not know each other and where connections are of a low “density” and are “looser” (Milroy and Milroy, 1978). Denser networks are related to stable, cohesive communities with little external contact, while less dense or looser networks allow for more contact with the outside (ibid).

Social networks can also differ in terms of the strength of ties, defined by Granovetter (1973) in the following way,

The strength of a tie is a (probably linear) combination of the amount of time, the emotional intensity, the intimacy (mutual confiding), and the reciprocal services which characterize the tie.

(Granovetter, 1973, p. 1361)

The importance of networks lies in the strength of interpersonal ties and how they relate to “diffusion, social mobility, political organization, and social cohesion” (ibid). However, while strong ties are a common characteristic of cohesive social groups, Granovetter claims that it is the weaker ties that lead to greater influence, information and mobility opportunity across wider networks and at a more societal level. Weak ties act as “bridges” to other relationships, while strong ties tend to close off connectivity beyond the intimate circle and possibly hinder the chance of wider connections.

Network analysis has relevance to expatriate adjustment, in that arrival in a new location presents individuals with a situation in which they have few strong personal ties and networks, outside their own family, although it is possible that they may know some of their work colleagues from previous experience. In this sense, sojourners can build bridges to other relationships quickly through the multiplicity of weak ties and familiarise themselves with their environment by learning how and where to access goods and services through a network of relationships amongst people in a similar situation.

The absence of strong ties, however, can be problematic in relocation, in terms of psychological adjustment at a time of substantial personal change. In this sense, Krackhardt (1992), for example, challenges Granovetter’s advocacy of weak ties for the following reasons.

People resist change and are uncomfortable with uncertainty. Strong ties constitute a base of trust that can reduce resistance and provide comfort in the face of uncertainty. This it will be argued that change is not facilitated by weak ties, but rather by a particular type of strong tie.

(Krackhardt, 1992, p.216)

Weak ties in relocation, then, can quickly become strong friendships and small, well-defined social groups, which, in turn, following Granovetter, could act to hinder the

bridging of new relationships and reduce connectivity to the wider sociocultural context.

Related to the relative value of strong and weak ties, is research into patterns of social interaction amongst expatriates, with the central controversy being whether home or host national relations exert a greater influence on cross-cultural adjustment. Bochner, Hutnik and Furnham (1985) highlighted this problem in a study that reported that only 17% of the friendships maintained by foreign students in the UK were with host nationals. Likewise, according to Furnham and Bochner (1982) less than 20% of social activities such as shopping, going to the pub, viewing films, or sightseeing were undertaken with host nationals. Fontaine (1986) has argued that relying primarily on co-national support may be a greater comfort in the initial phases, but could delay a fuller and more fulfilling adjustment in the long run, while Ward and Rana-Deuba (1999) argue for a distinction between psychological and sociocultural dimensions when examining social interaction. The latter studies, for example, found that strong identification with culture of origin through high quality relationships was associated with greater psychological well-being, while a stronger identification with the host culture led to fewer social difficulties in sociocultural adjustment. This has implications for the choices that individuals make in their social interaction in relocation settings and whether they form tight-knit, dense groups (Milroy and Milroy, 1978), closed to sociocultural contact, or whether they are more open to contact with the local population (Selmer and Luring, 2009).

3.3.4.3 Social Identity Theory

The choices that individuals make in adjustment differ according to the approach or strategy they adopt towards the degree of integration into a new environment and to the extent they wish to preserve or develop their own identity (Berry et al, 1989; Ward and Kennedy, 1994). Also, according to Social Identity Theory, group membership constitutes a fundamental part of an individual's identity and how they protect their self-esteem (Tajfel, 1982). In a cross-cultural situation, in which differences between expatriate groups and the local society may become accentuated and where adjustment to different cultural norms may be challenging, individuals may be motivated to protect their self-esteem and status through tight knit in-groups that enjoy high levels of trust, interaction, support and rewards and indulge in unfavourable comparisons between their own in-group and the local society. This

returns us to the notion of the expatriate “enclave” and the psychological comfort associated with it, a good example of which is described in Selmer and Luring (2009) where they describe a group of Danish business expatriates of a large Danish corporation and their families living in the same compound in Saudi Arabia. However, as these authors describe, the pressure of the in-group may come at a price for those who wish to seek closer contact with the host culture on a social level, as the in-group imposes its social structure on individuals derived from “spill over” elements from the working environment:

Breaking some of these rules could result in being excluded from social events. Too much contact with out-group members could also be perceived as harmful to the harmony of the group. The main problem seemed to be individuals engaging in outside relations and outside sources of status. That could happen, for example, if a couple became friends with some of the Americans, members of the Danish embassy staff, or if a woman acquired a job at the school.

(Selmer and Luring, 2009, p. 1458)

In this sense, individuals might be torn between choices over loyalty to a nationality or work group and the desire to seek a longer term experience through adjusting to the environment that surrounds them. This is not to say that psychological and sociocultural adjustment are mutually exclusive, however, and there is evidence to suggest that they are related (Ward and Kennedy, 1993), albeit predicted by different variables, but merely underlines the complex processes involved in adjusting to a new environment.

3.3.4.4 Third culture building

Another approach to social interaction in new environments is embodied within the concept of “third culture building” (Lee, 2006), which moves away from the notion of a two-culture dichotomy, which requires adjustment or adaptation, towards an interactional model of creating cultural understanding between two or more individuals:

A third culture perspective moves away from the study of established, identified individual component parts, or even systems, identified within participating cultures and nations, to a model which focuses on the situational and interactional communication processes between individuals from various nations or cultures.

(Casmir, 1978, p. 249)

In this sense, according to Lee (2006), the third culture is “a continuous process of negotiating shared meaning and the essence of relational empathy”, while “the crucial roles of members in the third culture are roles of cultural “middle man“ bridging between societies and cultures” similar to Bochner’s (1973) ““mediating man”, “ Adler’s (1974) “multicultural man,“ and Gardner’s (1962) “universal communicator” (Lee, 2006, p. 255).

The original notion of the “third culture” was based on observations of expatriate communities of different nationalities living temporarily in India (Useem, Donahue and Useem, 1963; Useem & Useem, 1967). A number of “subcultures” which were “generated by colonial administrators, missionaries, businessmen and military personnel” and each of which “had its own peculiarities, slightly different origins, distinctive styles and stratification systems” were outlined (Useem, 1973, p.122). Pollock and van Reken (2001) summarise the concept:

To best describe this expatriate world, the Useems defined the home culture from which adults came as the *first culture*. They called the host culture where the family lived (in that case, India) the *second culture*. They then identified the shared lifestyle of the expatriate community as an *interstitial culture* or “culture between cultures” and named it the *third culture*.

(Pollock and van Reken, 2001, p.14)

Pollock and van Reken (2001) develop the notion of a third culture amongst expatriates into that of a “community” or “tribe” (Pollock and van Reken, 2001, p. 49), not necessarily linked to any particular environment, but towards an international way of life, where individuals are uprooted from their first culture, never adapt fully to a second culture (because of the frequent re-location) and so create a “sense of belonging” towards “others of a similar Background and Context”, which is deemed the “third culture” or “interstitial culture” and which transcends location (Pollock and van Reken, 2001, p. 13). Lee’s (2006) concept is different in that the third culture is linked to a particular situation and is negotiated by the individuals of different cultures in their creation of mutual understanding.

Thus, while the notion of the third culture captures the dynamic processes of meaning making amongst individuals in a given situation, which define and redefine norms, roles, definitions and a way of life, by labelling the product as it does it also falls into the trap of reifying culture along the lines of much of the intercultural communication literature which focuses on *cultures* interacting, rather than *individuals*. Furthermore, individuals do adjust to new environments in that they change their behaviour and gain new understanding - they adjust to new driving norms, for example, they try to be polite and fit in with how things are done, they notice what is taboo and avoid it, they may learn the local language and they may even adopt new ways of dressing or eating or may learn the local dance and so on. However, it is unlikely that they would lose all aspects of a *first* culture or gain a *second* culture or even create a *third* culture, and any perceived borderline between one culture and another, which an individual is deemed to cross or fail to cross, would be difficult to locate. Likewise, as we have seen, social interaction is complex and adjustment is subject to individual differences does not lend itself to a homogeneous adjustment process or just one way of living, one expatriate community, clinically discrete from the local culture. In this sense, if we talk about a *third* culture, then we must contemplate the existence of a *fourth* and a *fifth*, and so on, in that sub-groups negotiate their way of life within any "situation" (Blommaert 1998, Holliday 1996). In other words, we must return to the notion of "discourse communities", where language and interaction are modified according to situation or group membership and where individuals construct their identity in terms of "who they are to each other", whether as part of a nation, a profession, a role and so on (Benwell and Stokoe, 2006, p.4). "Third Culture Kids" (Pollock and van Reken, 2001), then, can be seen as members of a dispersed discourse community with a shared understanding and similar experiences of growing up in varied circumstances, involving re-locating and adjusting to new environments and languages.

How individuals interact in a new environment, then, is at the heart of how they make adjustments to their new way of life, whether with co-nationals, host nationals or with other individuals that they meet in similar circumstances and this has an impact on their success in sociocultural adjustment.

3.3.5 Social support in adjustment

3.3.5.1 Introduction

Re-locating to a new environment can be considered a major life change in that it uproots families and requires individuals to adjust to everyday life often in a completely different cultural context, perhaps with a different climate and, more often than not, with the obstacle of having to negotiate fairly mundane daily routines in a foreign language (Hechanova et al, 2003). Individuals may have to adjust to new work roles, new schooling, new living conditions and, in the case of a spouse that has given up work to re-locate, probably a change in status and the loss of everyday support systems (Tung, 1981; Harvey, 1985). This can lead to emotional distress and extreme social difficulty and research into the process of adjustment in expatriates has indicated that social support plays a key role in reducing stress when adjusting to a new environment (e.g., Adelman, 1988; Fontaine, 1986; Walton, 1990).

3.3.5.2 Support mechanisms

Social support is normally defined in terms of the availability of “helping relationships” for people in need (Kraimer et al, 2001) and a good deal of evidence exists to suggest that problems may be alleviated with the right support mechanisms, which can impact positively on both the psychological and sociocultural level and alleviate loneliness, stress and depression (Searle and Ward, 1990; Ong and Ward, 2005). Ong and Ward (2005) identify four functions served by social support:

1. *Emotional support* (assertions or display of love, care, concern and sympathy).
2. *Social companionship* (belongingness to a group that provides company for a variety of activities)
3. *Tangible assistance* (concrete help in terms of financial assistance, material resources or required services)
4. *Informational support* (receipt of opinions and facts relevant to current difficulties)

The authors conclude that, despite the importance of emotional support amongst sojourners, it is practical support, together with local social networks, that are the most important for psychological well-being. Others have argued that individuals will use strategies to create a sense of mastery over and make sense of the environment and seek support and information from others in order to reduce uncertainty (Adelman, 1988), while Fontaine (1986) maintains that different needs and different

circumstances, such as the type of assignment being undertaken, the marital and family status of an individual and factors such as ethnic background, gender and so on, require different support mechanisms to enhance adjustment. There is even some support for the idea that certain national or cultural groups find it more difficult to seek or accept social support on the basis that it impinges upon the nature of status and relationships between people or comes across as a self-centred act in the face of the common good (Kim et al, 2006; Shelley et al, 2007).

3.3.5.3 The employer's role

Another key issue is the role and responsibility of employing organisations in providing social support not only to the employee but to the spouse and family, as some studies suggest that an executive's spouse and family often play a key role in the success of an overseas assignment and that, as we have seen, there is a clear "spill over" effect between work and family life (Tung, 1081; Harvey, 1985). As Copeland and Norellc (2002) point out:

The role of social support on international relocations is important because an overseas assignment presents both the disruption of established social support networks and the challenge to develop new ones. Such changes can be especially stressful for relocated accompanying spouses, due to competing family responsibilities, social isolation, socio-political constraints, and changes in their social and/or work status.

Copeland and Norellc, 2002, p. 255

The key aspect of the role of the employer in this is the level of concrete assistance that an organisation can supply in keeping with the level of resources available. This could be providing outsourced services for accommodation search, for example, or maintenance services for the upkeep of properties, or even special allowances for the extra expense incurred at the beginning of a sojourn. In larger organisations, there may also be a social element to this support through, possibly, the creation of a social club for employees or regular social events for families and so on.

Social support, then, is seen as an important provision in order to facilitate expatriate adjustment, perhaps more so than the provision of cross-cultural training and increasingly as a complement to it (Hechanova et al, 2003). It is also increasingly

related to factors beyond the workplace and the challenges faced by spouses and families in adjusting to a new way of life, which, in turn, can have a profound influence on success at work and overall adjustment.

3.3.6 The role of the spouse and the family in international assignments

3.3.6.1 Introduction

As we have seen in 2.2.4.2, there is a growing recognition of the importance of non-work factors in ensuring success in overseas assignments, which has given rise to a more multi-dimensional approach to the expatriate adjustment process through different “domains” (Black and Stephens, 1989; Black and Gregerson, 1991). This is relevant, because it takes into account the various circumstances of the employee and the spouse and family. While the working environment can vary substantially for expatriate managers, who may have to adjust to contrasting attitudes towards leadership styles, interpersonal relationships, task achievement, performance feedback and so on, it is common for many expatriates to travel with families. The challenge of ensuring a satisfying experience for spouses and children may well be beyond what they have been used to on domestic relocations.

3.3.6.2 The role of the spouse

International relocation can pose changes in lifestyle for accompanying spouses, who may face challenges in adjusting to life in an unfamiliar environment. This may involve adapting to new demands, such as dealing with a foreign language, for example, or learning where to obtain the basics of everyday living, maybe with unfamiliar customs or in a difficult climate, and so on. A spouse may also have to make major changes to her regular lifestyle and psychological adjustment to an international assignment is likely to be most difficult for the expatriate partner, particularly if the move overseas has meant that they have had to suspend their own career. A sudden role change from working life leads to a loss of status and independence leading, in turn, to feelings of being undervalued as a result of becoming a “trailing spouse” (Harvey, 1998). This may entail them spending long periods at home alone, without significant community ties, often having lost essential social and support networks such as colleagues, family and friends, particularly at the beginning of an assignment. Self-esteem may be affected and loneliness and depression may take hold with a sense of feeling “invisible” (De Verthelyi, 1995). This

may even turn into resentment, putting undue pressure on the marital relationship and affecting work performance of the employed partner (De Cieri et al, 1991).

All of this has an impact on the conduct of business in multinational companies, as the incidence of “dual-career couples” continues to rise and individuals are not prepared to neglect their own career for the sake of their partner’s or are not prepared to undergo such a radical life change in an unfamiliar environment with little support as. This, in turn, also affects the incidence of female executives in overseas assignments, as support systems may be necessary to cope with hostile or entrenched attitudes towards women in positions of responsibility or particular family circumstances, especially in the case of dual career assignments (Caligiuri et al, 1999).

According to some studies, one way of addressing this is to provide better support and work opportunities for spouses, including language training and pre-departure briefings and training (Harvey, 1995; Punnet, 1997). However, this is expensive and companies may be reluctant to fund such activities. Another approach may be to improve selection procedures to recognise the contribution of the spouse to the success of the assignment and involve them in the decision to take a post (Copeland and Norellc, 2002). Some research has developed a “model of spousal adjustment”, indicating that older spouses and spouses with language ability, previous experience of international assignments and from culturally similar backgrounds adjust more easily (Mohr and Klein, 2004). This approach looks closely at the attributes that an expatriate spouse may have in order to cope better with expatriation and to offer the right type of support to the employee. Caligiuri et al (1998), for example, found that spouses and families who had a “positive attitude” towards living overseas adjusted better to their new environment, while Mohr and Klein (2004) emphasised attributes such as “experience”, “motivation” and “openness”, in addition to those mentioned above, in order to set up new “friendship networks” and gain “a sense of control”. In conclusion, they state that, “Women with the best adjustment appear to have a network in place that will respond to their varying emotional and recreational needs” (Mohr and Klein, 2004, p.269].

3.3.6.3 *The family in adjustment*

Other family members can also face particular challenges. Children, too, for example, may need to adjust to a new school system or a new language and may have to cope with losing friendship networks and familiar comforts from home, as Fukuda and Chu (1994) point out,

The impact of the international relocation is likely to be more severe on spouses and children than on expatriate executives, who can continue to work in an atmosphere of stability through office routines and an ongoing network of colleagues. The family has less stability and suffers losses, including the disruption of children's education, of a sense of self-worth and identity, and of close contact with relatives and friends. The corporate executive's mobility forces spouses and especially children to be passive participants in relocation, and it may adversely affect their feelings of security and well-being because of the loss of ties with community life.

(Fukuda and Chu, 1994, p. 43)

In more recent studies, the adaptation of children to new environments has gained some prominence, indicating, for example, that they are "most concerned with the ability to make friends, fit in and be successful in the new location, and especially at their new schools" (Weeks et al, 2010, p.37). The authors recommend that some attention should be given to preparing teenagers for expatriate re-location, in particular, because of the crucial stage they are at in their development and the potential problems that they can cause for their parents, who may already be trying to cope with extra demands and challenges.

3.3.6.4 *Crossover and spillover*

While the adjustment of families to a new environment can present challenges in itself, it can also have an impact on the performance of the employee and the success of their assignment as part of a "spillover effect" between home and work and stress "crossover" between partners (Harvey, 1995, Haslberger and Brewster, 2008). The key concern here for multinational organisations is that issues in the home, specifically linked to relocation, may put extra stress on expatriate managers themselves, who may also be trying to cope with learning a new language and learning to adapt to local working practices, as they see their family unhappy and struggling to adapt to their new life. Alternatively, issues at work may impact on the

non-work domain, which may compound family problems and increase stress for the employee. This is described in the following extract.

Expatriates have to adjust to each of the domains separately. Of course the domains are not isolated or independent from each other. Therefore, spillover takes place from one domain into another. Work-family conflict is an intensively studied area in organizational behavior and has been shown to exist for expatriates as well (Bhaskar-Shrinivas et al., 2005). Besides spillover among domains, crossover may occur between individuals. This crossover can affect the same domain in both individuals, for example the partner's adjustment to social relations may influence the expatriate employee's adjustment to social relations. It can also cut across domains, for example the expatriate's work adjustment impacting the partner's adjustment to family life (Parasuraman et al., 1992; Westman, 2001).

(Haslberger and Brewster, 2008, p. 327)

In summary, many non-work factors can affect the success of an overseas assignment and the role of the spouse and the family is increasingly being recognised as making a key contribution to the work performance of employees. Attention to a number of factors is important, including the spouse's personal characteristics, experience and individual response to expatriation, the spouse's career prospects and sense of self-worth or status, social support systems for the family to adapt to a new environment and schooling, training in language and cross-cultural awareness, and involving the spouse in decisions to re-locate are all areas that are preoccupying companies in making selection decisions and trying to deal with the problems and adjustment of expatriates and their families. The real questions are to what extent companies can provide support for this wide range of circumstances and to what extent should the ability of the family to adjust should be part of recruitment and selection.

3.4 Conclusion and rationale for the research

The aim of this research project is to explore the notion of culture shock amongst expatriate workers when relocating and into a new environment. There is increasing recognition of the complexity and challenge involved in expatriate re-location, particularly in the case of spouses and families, and this study aims to explore some of the issues involved in adjustment. Adjustment is seen as a multi-faceted phenomenon and challenges the notion of "culture" as a tangible, objective concept

that causes a “shock” or a “clash”. It argues that it is how individuals and groups deal with the macro socio-political context and micro-cultural situations on a day to day basis that influences how they experience their new situation. As we shall see in the next chapter on methodology, through participant observation and by drawing on accounts of how individuals see the challenges they face and what helps them adapt, a rich ethnographic “thick-description” is built up of the daily challenges of adjusting to a new environment in a particularly challenging location. Such an approach responds to a call for more ethnographic analysis in intercultural communication research, particularly when portraying the process of meaning making in context. For example,

My view is that intercultural communication continues to be a meaningful concept but that we need to focus on a new research question: who makes culture relevant to whom in which context for which purposes? In order to overcome the banal nationalism that can be found in a large segment of the intercultural communication advice literature, ethnographic studies of communication and identity making in context...are of paramount importance.

(Piller, 2011, p. 72)

In this sense, a new environment is depicted as a rich and vibrant experience of meaning making and learning, within which there may be certain factors that can make an unfamiliar environment challenging in terms of adjusting to it. Novel communicative and behavioural conventions can result in psychological, sociocultural and professional difficulties, all of which beckons for added research in this area. Individuals respond and cope differently and often have the added responsibility of settling family members in a new environment, who may, in turn, have their own coping problems and solutions. Many factors can influence adjustment, some of which are in the hands of global organisations to enhance, and there is growing recognition of how non-work related factors can influence the nature and success of an assignment. The rationale for this research project, then, is to investigate how international sojourners cope with an international assignment in a particular and unfamiliar cultural environment and what factors help them adapt to this new social experience.

Chapter 4. Research Methodology

4.1 Introduction

This chapter sets out the main methodological issues faced in the research setting, which was described in Chapter 2: Research Context, and explains the methodological choices that I made in carrying out the study and justifications for them. In examining the nature of the research setting, I first draw on previous studies based in Cuba in order to explore the obstacles encountered by such an isolated and restricted setting and then analyse the solutions that they proposed and how they compared with my own approach. I also describe what role I had in Cuba as a resident there and how this influenced the approach that I adopted. Finally, I describe what sort of data I chose to collect and why, and how I analysed my findings for presentation in the following chapter.

4.2 The issue of research sensitivity

4.2.1 Introduction

The context of the research is particularly relevant in this study, because, as we shall see, like others before me, I felt constrained to adjust my original intentions with respect to methodology. From the outset, as researcher, I was in a unique position with Latin American experience and knowledge of Spanish with considerable access to daily life, but, which, at the same time, constrained me to make certain choices about data collection. I explain the choices that I made about research methodology and the reasons for them in section 4.3

4.2.2 Forbidden research terrains

As described in Chapter 2, daily life in Cuba is subject to very particular conditions. Cuba can be described as a fairly insulated state in which there are no free press or international media and where access to the internet and other forms of communication is highly restricted and monitored (Amnesty International, 2010; Voeux and Pain, 2008). Furthermore, a high degree of social control is exercised by the Cuban authorities and permission to do any kind of research needs to be obtained through official channels (Bell, 2013). Any researcher would need a special invitation and visa to carry out research and it is likely that their access to the setting would be monitored (ibid). Cuba is also still largely off-limits for official collaboration for the US government and, as a result, Fuller (1988) labels Cuba a “forbidden

research terrain”, which she defines as “whole areas of possible investigation, which may be geographically, intellectually or institutionally defined” and in which “social scientists are strongly discouraged from pursuing research” (Fuller, 1988, p. 99). This, she argues, has made Cuba a very difficult context to carry out research in and throws doubt on the validity of research done in such a context.

First, once a research terrain has been forbidden, what little independently-generated research that does get carried out will be greeted with suspicion, if not discounted completely by some, because it is not likely to conform to the methodological standards expected in open research settings but difficult, if not entirely impossible, to adhere to in forbidden terrains. As an example, though it would have been impossible for me to interview any workers at all in my study of workplace decision making in Cuba had I insisted on a random sample, I have received a disturbing number of queries on the generalizability of my findings.

(Fuller, 1988, p. 111)

However, as we shall see below, there are a number of ways of carrying out research in such difficult circumstances, which are just as valid as “open research settings” and it is perhaps a question of adapting suitable approaches given the nature of the setting.

4.2.3 Doing research on sensitive topics

Lee (1993), highlights the “sensitivity” of research in certain circumstances and identifies the notion of “political threat” in some contexts, where research may be contextually sensitive and “may have repercussions within the setting” of the “wider social, economic and political environment” (Lee, 1993, p. 7). In this sense, Lee points out the possibility that researchers may “opt out” of doing research in sensitive areas or on sensitive topics, which he describes as an “evasion of responsibility”, and which, he suggests, should be addressed so that important research can continue.

The threats which research poses to research participants, to the researcher and to others need to be minimised, managed or mitigated, but without compromising the research itself or limiting the overall scope of research to address important features of contemporary society.

(Lee, 1993, p. 16)

While, this is a valid point, it may not always be possible to eliminate threats to personal safety, for example, and the sorts of barriers to research described here, naturally, have restricted the independent examination of daily life in contemporary Cuba (Hirschfield, 2007). However, despite these restrictions, some quite specific studies have been carried out. These studies have been done with varying degrees of official sanction and with researchers encountering a number of obstacles.

For example, Blum (2011), who carried out research into the Cuban secondary Education system with official sanction, claims that her study was unique and “unprecedented”. She also describes some of the difficulties that she had in collecting data and the high level of monitoring that she experienced from government officials.

Receiving formal permission from the Cuban government to conduct long-term research in a Cuban school was unprecedented, according to MINED officials. Likewise, my methods of data collection, analysis, and interpretation were unique by the very activity of conducting research in this "forbidden research terrain" (Fuller 1988). It took me several years to gain access to a Cuban school, and when I did, I was assigned a Cuban mentor and debriefed by MINED before leaving Cuba. I began seeking permission for a long-term engagement during the initial years of fieldwork for my master's thesis. Even with the intense monitoring of my work by government officials, teachers and students wanted their stories told, and navigated the political obstacles for me so that I would "see more" and tell the "real story."

Blum (2011b, p.4)

It is not clear from Blum's study what the nature of her relationship with Cuba was exactly. However, for her research project to be accepted and proceed under such overt monitoring, in my experience, it is likely that she would have had to have a favourable disposition towards the achievements of the Cuban Education system and share, to a large extent, the worldview of the Cuban government about the global position and the interpretation of the recent history of Cuba. For example, in her blog, *Along the Malecón*, she makes an assumption about the role of the US embargo which is aligned with the view expressed in official Cuban discourse, describing it as “the U.S. government's longstanding antagonistic and colonizing position toward Cuba” (Blum, 2011a). Blum's alignment and acquiescence to the monitoring

authorities is further intimidated in her summarising comments, in which she openly describes their concerns about the conclusions of the research:

With all of the political sensitivity surrounding my presence as a U.S. researcher investigating the prodigal child of the Cuban revolution, the educational system, what I found most surprising was the remark of a MINED official during my final debriefing. He asserted, "Criticism of the Cuban education system is okay, but with all of our difficulties, please do not leave us beaten up and on the floor. As you know, we have a history of being bullied by the United States. Recognize that we have implemented methods to save our educational system. We care about our people. Try to leave it on a positive note."

(Blum, 2011a)

In this sense, this research could be seen as a means of serving the purpose of the Cuban regime in its presentation of itself internationally, as well as being a research study into the nature of its Education system. This is not to necessarily question the validity of Blum's conclusions, which are, in fact, largely balanced. For example, she concludes in her blog:

For me, it was not one extreme or another. I really did see marvellous things taking place at the school, as well as critical struggles for teachers and students.

(ibid)

In another study, Wilson (2011) refers to doing research with different levels of official sanction, noting that there is a contrast between studies carried out before the growth of tourism which allowed Cuba to emerge from the Special Period in early 2000. She refers to Rosendahl (1994), which, in contrast to her own, required official permission for an extended study, and which, in her view, influenced access to "marginals", or individuals not approved by the regime,

Looking back on her research, Rosendahl somewhat naively reflects, "Only slowly did I come into contact with other people, some of whom were marginals. I do not think that my relationship with them was hampered by the fact that they knew I was also friendly with the leaders" (ibid, 18). I would argue, however, that everything that Rosendahl experienced was colored by the fact that she was friendly with the leaders, just as everything I was able to learn was colored by the fact that I was not.

(Wilson, 2011, p. 3)

In this sense, the difficulty and reliability of doing research within a context of a high degree of monitoring and control must be re-iterated and the perspective of the researcher within such a framework must be revealed and explained through a process of reflexivity, in which the researcher “comes clean” (Holliday, 2007, p.138) and explains how he or she is “entangled with the politics of the research setting” (ibid, p. 137). My own involvement with and assumptions about the context of my research are discussed more in depth 4.2.7 below, where I discuss my research agenda.

4.2.4 Doing research in politically sensitive locations

A more recent study, investigating the impact of environmental policy and practice in Cuba, describes the experience and issues in doing social research in what the researcher calls “politically sensitive locations” (Bell, 2013) and the strategies she adopted to overcome the obstacles she faced. From the outset, she acknowledges the nature of the research setting as challenging:

Cuba, a country that is often portrayed as an isolated, secretive and bureaucratic dictatorship, would appear to present many challenges for a social researcher intent on eliciting the genuine opinions of the native population.

(Bell, 2013, p. 109)

Bell goes on to describe a number of “unforeseen challenges, restrictions and limitations”, which limited her access to the setting.

As a non-citizen, I was obliged to stay in licensed accommodation and this was only available in tourist areas. This made it virtually impossible for me to visit areas that were not set up for tourism.

(ibid, p. 113)

In addition, she describes the bureaucracy involved in gaining permission to do research and how she was obliged to change how she approached her investigation because of the unpredictability of the setting.

I needed to be invited to the country by a Cuban organisation in order to obtain an academic visa. The International Institute for the Study of Cuba, then based at

London Metropolitan University, assisted me with contacts so that I was able to secure an invitation from the Law Department of the University of Havana. The Law Department made no attempt to influence or control my research, whatsoever, and completely left me to my own devices. Even so, it was sometimes difficult for me to be sure how much freedom I really had. For example, about a month into the research, I was summoned to a local immigration office and told I could not continue my research without an official programme of interviews organised by the host organisation, the University of Havana.

(ibid, p. 114)

Thus, for Bell, “the political situation meant that attaining valid and reliable data became a major issue”, as “myths abound, and it often felt like peeling away layers of reality, always having to find out what lay below what was being presented” (ibid, p.110). She came across a number of unexpected “pitfalls”, and had to rely on the “flexibility” of participant observation (ibid, p.108). Bell also raises particular concerns about “subjectivity” and both “participant reliability” and “researcher reliability” in such a context and I discuss these in relation to my own research in detail in section 4.4 below. In the meantime, it is clear from this example that formal research design is influenced by the restrictive context of Cuba and this can lead to a need to adapt research methods on location.

4.2.5 Adapting the research approach

Another study carried out in Cuba by Hirschfeld (2007), which Bell refers to in her study, examined the workings of the Cuban health care system and described how the context of research led her to completely overhaul her research methodology and take on a different role because of the obstacles she faced. Here, for example, she describes the difficulty of obtaining authentic views from the local population on the research topic.

Unfortunately, research exploring negative aspects of the Cuban health care system cannot be undertaken with methodological rigor. Public criticism of the government is a crime in Cuba, and penalties are severe. Formally eliciting critical narratives about health care would be viewed as a criminal act both for me as a researcher, and for people who spoke openly with me. As a result it can be very difficult for foreign researchers or other outsiders to perceive popular

dissatisfaction, and few Cubans are willing to discuss dynamics of power and social control in a forthright manner. Conversations on these topics can be quite cryptic, and meanings are deliberately obscured.

(Hirschfeld, 2007, p.3)

What Hirschfeld seems to mean by “methodological rigor” is the freedom and independence of the researcher to apply a consistent methodology without interference from the authorities, and she goes on to describe the limitations of studies that “have not been based on any ethnographic or qualitative research”.

When social scientists interested in health care have gone to Cuba, their research appears to have been of short duration and most likely mediated through the use of government-provided translators or guides. As Paul Hollander has pointed out, short term “hosted” visits to socialist countries have historically resulted in painfully inaccurate assumptions about the nature of life in these societies (Hollander, 1998).

(ibid, p.4)

In other words, taking an overt research approach with official support, as the previously mentioned studies point out, can challenge the validity of the research undertaken. As a result, Hirschfeld describes how she abandoned her “formal research agenda” and “formal role as scholarly researcher” and instead “strove to learn from an insider perspective by taking on a “membership role”, which brought her into close proximity with local Cubans within the community she was researching (ibid, p, 4). In this way she was able to elicit “critical narratives” about the Cuban health care system from informal encounters, which she describes as follows.

Instead of formal interviews, I carried on ordinary conversations with people in the course of everyday events such as waiting in food lines and social visits. I was careful never to ask politically sensitive questions, but simply listened to people and gently probed for more information when they volunteered this information themselves. Much to my surprise, people seemed quite willing to discuss these kinds of issues off the record.

(ibid, p.4)

This approach is mirrored in another study carried out by Wilson (2011), who describes the lengths she went to in order to protect people in the context.

I have taken great pains to conceal the identity of all of my informants in this work. This was especially important given the fact that at the time of my research, criticizing the Revolution to a foreigner was an offense punishable by a 20-year prison term. While in the field, one way that I tried to protect those who agreed to live, work, and talk to me was to be discreet about the fact of the research itself. This meant I tape recorded nothing, took few photographs, and rarely used a notebook to take notes, all of which would have made those around me uncomfortable.

(Wilson, 2011, p. 4)

Likewise, Hirschfield describes how she was careful to protect confidentiality in much the same way that I felt I had to do in my own research.

Given the sensitive nature of such comments, extra care has been taken to insure confidentiality. All names in this paper are pseudonyms, and in some cases genders, ages and geographical locations have been changed to further conceal identities. Phrases marked as direct quotes were not tape recorded. Instead I made notes to myself in my field notebook as soon as possible after the interview or conversation took place.

(ibid, footnote 2, p.19)

As we will see, the way Hirschfield and Wilson adjusted their approaches to the context is similar to the kind of challenges that I faced myself as a participant observer and researcher in Cuba, and I describe the kind of strategies that I adopted as a result to carry out my study. These researchers preferred to adapt their approach, rather than acquiesce to interference or put themselves or others in danger. These are methodological adaptations directly influenced by the context of the research and they are relevant to the methodological choices I made in my own project, outlined in 4.3below.

4.2.6 Covert research in Cuba

The kind of challenges faced by doing research in such a setting as Cuba, then, reduces the likelihood of being able to adopt a traditionally overt research role and

research methods without interference. It is for this reason that a very sensitive study carried out in Cuba for ECPAT, an international organisation dedicated to the protection of children, adopted a covert role while investigating aspects of the tourist industry in Cuba, which was under scrutiny as possibly contributing to the exploitation of young people. The study describes the profiles of tourists and the reasons for their stay and highlights the vulnerability of locals in interactions with tourists due to economic inequality and the need and temptation to search for supplementary means of income.

A key problem that we faced in undertaking this research was the fact that all our interview work (except with trusted key informants) had to be covertly undertaken. Because it seemed unlikely that the Cuban Embassy would issue a work visa to researchers concerned with a topic that is currently viewed as embarrassing to the Cuban state, we entered the country on a tourist visa. This meant that we could not take the simplest route to discovering certain background details about sex tourists (namely, asking them to co-operate with general research on tourism in order to ask a series of questions about age, occupation, other holiday destinations, etc.) but had to conduct all interviews as though they were chance “conversations”.

(Sanchez Taylor and O’Connell Davidson, 1996, p. 6)

Adopting a covert approach in this study is not only to do with the context of research, of course, but also, in part, to the sensitive nature of the research topic. However, this is in contrast to another study done by the same organisation across several other Latin American countries, including Chile, Colombia, Guatemala, Mexico and Peru, which managed to enlist the collaboration of local official organisations, facilitated public discussion in the form of a conference and openly interviewed official, journalists and workers on location with official permission (ECPAT International, 2011). In this sense, it could be argued that adopting a covert approach was a decision influenced at least as much by the nature of the context as the nature of the topic, as the authors felt that it was unlikely that they would be granted official permission to carry out the research in Cuba. While my own research did not broach such a sensitive topic, it did explore daily life in a monitored and sensitive setting and could be seen to be inappropriate and possibly leading to critical analysis. For this reason, I had to make some carefully considered decisions about how to explore and analyse the daily life of sojourners in my research.

4.2.7 Research agenda

In summary, much of the recent research carried out by external researchers in Cuba points to some degree of limitation and difficulty. In this sense, in terms of my own “agenda” in my research, I am in accordance with the description of Cuba as a “politically sensitive” research setting or “forbidden terrain”, as described in the previous section, and because of my professional position in Cuba, I adapted my methodological approach to make the most of my immersion in daily life over three years without calling attention to my research. As described in Chapter 1:

Introduction, the fact of the matter was that I was on location in an official capacity, and, while this may not have been an impediment for me to carry out research in a different context, in Cuba, at the very least, it would have been highly scrutinised and possibly sanctioned, on the grounds that I was on location for an official purpose and could be seen to be violating the terms and conditions of my visa. While, on the one hand, as I go on to describe below, I had unusual access, due to my position, to all sorts of forums and areas of local life as an official resident and which would be unusual for a short term visitor or researcher, on the other, there were restrictions on my movements as an official, particularly on official visits outside Havana and beyond the normal perimeter that I would be expected to maintain by the Cuban authorities. As a result, I felt bound to be sensitive towards the demands of my hosts and my employer and I judged that I could carry out a unique and interesting study, beyond the confines of my professional duties, but which would also enhance the understanding of the adjustment of international sojourners in a particular context such as Cuba. In this sense, my study is not about Cuba, nor about the Cuban regime, and my comments and conclusions should be seen as impartial in regard to any judgements about the nature of the setting or the social actors within it. I am interested solely in how such a context can impinge upon the process of sojourners on international assignment.

As we have seen, much of the research on Cuba is born from an intellectual interest in and, possibly, an admiration for the achievements of the Cuban revolution. In some ways, in my view, the default intellectual position on modern Cuba, and, hence, underlying agenda, could be described as one of political bias and sympathy towards and potential exoticisation of the Cuban revolution. To illustrate this, I have mentioned the possible predisposition in Blum’s study, for example, while Bell is

open and explicit about her sympathy towards the Cuban government and socialism in general.

Before I began my fieldwork, my particular views were broadly supportive of the Cuban Government and the socialist system. These views were based, partly, on over 10 years of contact with, and study of, the country. Yet they had also grown out of my personal values. For me, socialism may be problematic in some aspects, but the socialist values which prioritise equality and social justice and the belief that this must be achieved collectively resonate deeply with me.

(ibid, p. 117)

As a result, Bell admits that this influenced how she conducted her research:

I felt protective in that I did not want my work to be used against the revolution and sometimes I felt pulled by a sense of loyalty to the revolutionary people I met in Cuba.

(ibid, p. 118)

In my time in Cuba it was commonplace to hear, almost daily, about the impact that the US embargo had upon the Cuban economy. In fact, Bell (2013) makes much of this and makes frequent reference to the idea that the current economic situation of Cuba and its impact on daily life is a direct result of this policy, rather than, for example, the role played by a centrally planned economy or political ideology, and possibly without recognising that a number of developed countries nearby, such as Canada and Mexico, have never severed trade links with Cuba. The difficulties she encountered, she states, “were often a direct result of, or linked to, the economic embargo on Cuba” and, more specifically, that the embargo “created fuel shortages” or “difficulties of phoning or communicating by email from outside Cuba” (Bell, 2013, p. 113). Bell admits that she could be accused of “naively accepting Government discourse” and that she “verified the statements” she made about the impact of the embargo “throughout her research study” (ibid p. 114), but as outlined in 2.4.7, there is divided opinion on role of the embargo in the economic management of Cuba, and it is subject to numerous points of view and interpretations, and I would argue that there is enough doubt and controversy to avoid making causal links to local views on this topic during research. It may well be that the embargo has a role in making “life extremely hard, creating many shortages and privations” (ibid p. 119), but there are

other perspectives, as described in 2.5, some of which involve the exercise of choice and intent on the part of the Cuban government.

In this sense, I have tried to be academically impartial with respect to modern day Cuba and my research neither seeks to pedal nor denigrate any political agenda. However, I recognise that it would be impossible to eradicate comments and reflections by participants on the macro-political and social forces that impinge upon their living conditions and daily lives and that, through my use of sociological imagination, I am bound to take a stance on the wider “public issues of social structure” (Mills, 1959, p. 6). Thus, while my intention is to explore the everyday, “demotic” level, I also recognise that there are other discourses, both within and outside Cuba, that seek to impute meaning and perspective on people’s experiences.

4.3 Methodological approach

4.3.1 *Ethnography*

As described above, my immersion in the local setting as a participant gave rise to the rare opportunity to carry out an interesting study of international expatriate sojourners during re-location and I opted to do an ethnographic study. Ethnography entails “the extended involvement of the researcher in the social life of those he or she studies” (Bryman, 2008, p. 401), and the opportunity presented itself to establish a rich and detailed account of the life of a group of sojourners in context. This qualitative research project complements many other studies on adjustment, described and discussed in Chapter 3, which have focused on gathering quantitative data of sojourner experiences in differing contexts and many of the concepts and theoretical constructs, such as “acculturation strategies” (Berry and Kim, 1988), “culture shock” (Ward et al, 2001), “social identify theory” (Tajfel, 1982), “domain” theory (Hechanova et al., 2003), and the “expatriate family” literature (Haselberger and Brewster, 2008), from this previous research are used in the analysis where it is relevant and can illuminate aspects of the data presented throughout Chapter 5: Presentation of Data and Chapter 6: Discussion.

The process of research in ethnography is essentially inductive, “working from empirical evidence towards theory” (Blommaert and Jie, 2010, p. 12). Within this process the researcher can organise and understand data so as to be able to draw out and explore the relevant theoretical frameworks from it. Participant observation is

closely associated with ethnography and in many regards treated as synonymous, although observation does not necessarily imply the final written analysis that ethnography entails. In this sense, “ethnography’ frequently denotes both a research process and the written product of that research” (Bryman, 2008, p. 402).

Ethnography and participant observation are essentially interpretative, “in a situated, real environment, based on interaction between the researcher and the subject(s)” and entailing “a complex of events which occurs in a totally unique context – time, place, participants, even the weather...” (Blommaert and Jie, 2010, p. 17).

In this sense, the context of the study is key to understanding the meaning of actions and events, whether as day to day, unpredictable “micro-contexts”, such as “foul weather”, or a “power failure during a meal in a restaurant”, or as wider, more stable “macro-contexts” drawn from “social, cultural, historical, political, institutional contexts” (Blommaert and Jie, 2010, p. 18). For example:

When someone says “yes, sir”, this is a microscopic, almost trivial thing. Context tells us, however, that this innocuous formula draws on enduring systems of power and authority in our society, as well as on gender roles and structures, ideologies of politeness and etiquette. The microscopic, trivial instance of using it now becomes something far richer: we see that the user of the phrase summarises a world of (macro-contextual) social rules and conventions in his/her innocuous, routinised utterance, and submits to it. He/she displays “conventional” behaviour, that is, behaviour that exudes the dominant social structures and expectations. The event in itself does not tell us that; the contextualisation of the event does that”.

(Blommaert and Jie, 2010, p. 19)

Ethnography, then, entails gathering and contextualising data from a number of sources over a period of time to understand the situation of a group of people, whether through direct conversations with members of the group, observations of their behaviour, personal accounts and interpretations of feelings and events, relevant documents and accounts of events and possibly interviews to probe certain issues or to collect more specific or obscured data. In this way, it is possible to gain a holistic picture of the context in which research is being undertaken. Details about the exact methods used are set out in the sections below.

In order to write freely about the access I had to the local setting and to be able to bring out the vibrancy of daily life, I have opted to write in the first person, because the initial feedback that I received on my first drafts was very similar to how Holliday describes “the established genre of social academic writing”, namely, “dull, mechanical and impersonal” (Holliday 2007, p. 119). This is not without challenges, as I have found that I have had to pay particular attention to “voice” in my writing in order to be clear about representing others’ views, and this is discussed in detail in section 4.4, where I look at issues of subjectivity.

4.3.2 Ethnography and “thick description”

A key technique in writing ethnography is the use of “thick description” (Geertz, 1973, p.9). In fact, as Geertz (1973) writes, “ethnography is thick description” (Geertz, 1973, p.9), and it is characterised by “a multiplicity of complex conceptual structures, many of them superimposed upon or knotted into one another” (Geertz, 1973, p.10). By examining the multiplicity of structures and their relationship, then, through careful observation and analysis, the ethnographer can build up an account and an interpretation of what happens in an everyday context through the use of sociological imagination (Mills, 1959). This is a very different approach to quantitative research, in that there are only quite general and much fewer a priori categories to interpret social phenomena, and it is the role of the researcher to comb through the complexities of what he or she observes to build up.

One issue with using thick description, however, is understanding what it actually entails. As Ponterotto (2006) points out:

Despite the widespread use and acceptance of the term “thick description,” in qualitative research, there appears to be some confusion over precisely what the concept means.

(Ponterotto, 2006, p. 538)

The term was first described by Gilbert Ryle and Ponterotto uses an example from Ryle (1949) of a golfer practising hitting balls repeatedly to the same green to contrast both a “thin” and a “thick” description.

A “thin” description of this behaviour is that the golfer is repeatedly hitting a little round white object with a club like device toward a green. The “thick” description interprets the behavior within the context of the golf course and the game of golf, and ascribes thinking and intentionality to the observed behavior. In this case, the golfer is practicing approach shots on the green in anticipation of a future real golf match (which usually includes two or four players) with the hope that the practicing of approach shots at the present time will improve his approach shot skill in a real match at some time in the future. Thus for Ryle, “thick” description involves understanding and absorbing the context of the situation or behavior. It also involves ascribing present and future intentionality to the behavior.

(Ponterotto, 2006, p. 539)

In this sense, according to Ponterotto (2006) “a central component of ‘thick description’ is the interpretation of what is being observed or witnessed” (ibid p. 542). It entails “accurately describing and interpreting social actions within the appropriate context in which the social action took place” (ibid p. 542), and capturing “the thoughts, emotions, and web of social interaction among observed participants in their operating context”, as well as “assigning motivations and intentions” as part of this action (ibid p. 542). In this sense, Ponterotto stresses the importance of Denzin’s concept of “thick interpretation” (Denzin, 1989), which leads to a sense of “verisimilitude” or “truth like statements that produce for readers the feeling that they have experienced, or could experience, the events being described” (Denzin, 1989, p. 83-84) and to “thick meaning” that resonates with readers (Ponterotto, 2006, p. 543). Interpretation by the researcher, however, also makes use of sociological imagination in that it places the individual “and the range of his immediate relations with others” within the “larger structure of social and historical life” (Mills, 1959, p. 8), thereby allowing the researcher to “grasp what is going on” at the “intersections of biography and history within society” (ibid, p. 7).

For Holliday (2005), thick description is about articulating a “personal narrative as one of a collection of interconnected voices” in a text (Holliday, 2005, p. 307), in which the researcher writes with a number of voices described as:

1. “First voice”, which is the personal narrative of the researcher and reasons for doing the research

2. “Second voice”, which “comprises the data (descriptions, artefacts, transcripts, recordings, documents, etc.)” (ibid)
3. “Third voice”, which “comments on the data at the time of collection” and, at the time of writing, can describe and reflect upon the “experience of doing the research” (ibid)
4. “Fourth voice”, which “comments on the first three voices at the time of writing” and plays a “critical role” by directing the reader to the “specifics of the data” (ibid)
5. “Fifth voice”, which is the “final overarching argument that connects and pulls together all the others and that speaks about the whole research process and takes the final responsibility” (ibid).

Thus, as Holliday describes, thick description comes from the “interconnectedness” of these voices:

Voices 1 to 3, voice 4 and voice 5 thus correspond to the distinction between data, commentary and argument, which are the building blocks of thick description (Holliday, 2002, pp. 110–115). The thick description is built from all the data in voices 1 and 2. Whereas the claims that can be made are largely subjective because they are based on fragments of interview, artefact, experience, and so on, it is the rigorous way in which these fragments are interconnected as thick description that will provide the validity for these claims.

(ibid, p. 308)

In this context, I was ideally placed to participate in and explore the experience of sojourners first hand and build up an understanding of the challenges they faced and the choices they made to adjust to their new environment. In section 4.4.3 below, I return to the topic of voice and how I addressed subjectivity by representing voices other than my own in the study. Also, in section 4.6.4, I describe how I use thick interpretation and sociological imagination to build up an ethnographic interpretation of the adjustment of sojourners in the context of the study.

4.3.3 Access to the setting

As noted above, I was able to have fairly free access to the social setting in order to gather data, as I was a participant in the life of sojourners. My professional function as an official representative of my country on location gave me access to both official

meetings and a lively and varied social life. This access focused the research both on shorter-term sojourners, in Cuba for just two or three years on international assignment and from a wide variety of nationalities, but also gave access to longer-term, “embedded” sojourners, who had set up fairly permanent residence in Havana and had sometimes married locally. My ability to converse in fluent Spanish and other languages also increased my access and widened the perspective of my research.

Given that the context of Cuba and, more specifically, Havana, as described in Chapter 2, is politically sensitive, I concluded, after much deliberation and soul-searching, that it would not be feasible to obtain open, unmonitored data without risk to participants or interference from the authorities. As a result, I adopted a covert role for the research project, using a similar approach to the one mentioned by Hirschfield (2007) quoted in 4.2.5., in which I have taken particular care to ensure confidentiality by using aliases in the text and by changing the identity, nationality and sometimes gender and occupation of the people I encountered. I carried out no tape recordings and made no direct field notes, so as not to draw attention, but made notes in the form of personal journals as soon as possible after encounters with sojourners. These are described in section 4.5.3. This brought both advantages and disadvantages. On the one hand, it meant that access to the setting became deeper and further-reaching, enabling me to talk to a wide range of people and to direct conversation on to relevant topics without being challenged. It also meant that I could witness interaction as a participant and go into situations and encounters without being tethered by the persona of researcher. On the other hand, being covert meant that I did not have an independently recorded body of data from which to do detailed analysis, but, in my honest judgement, I saw no other way of carrying out research without drawing unwanted attention to my exploration of daily life in Havana. Clearly, this raises ethical issues and issues of research reliability and voice in my analysis and this is discussed below.

4.3.4 Reactivity

There was another reason for opting to talk to people informally and avoid note-taking. When I first moved to Cuba, I was so curious about the unusual things that I was witnessing in a context of surveillance and unfamiliar perspectives, that I often asked for explanations for the way things were. On many occasions, people would

not give an answer or would change the topic of conversation and I discovered that it was sometimes more productive to let conversations play out or draw people out by looking quizzical, rather than asking direct questions. In this sense, being a participant and taking a covert research role avoided, in some measure, the problem of “reactivity”, in which participants are “less likely to adjust their behaviour because of the researcher’s presence” (Bryman, 2008, p. 406). I found that sojourners were sometimes reluctant to give open opinions about their experiences even in normal conversation, let alone in an interview, which, as Bell (2013) had also found to be “limited in that the conversations are ‘artificial’ and people do not always articulate their true thoughts or behave as they say they would” (Bell, 2013, p. 111). Similarly, Hirschfield (2007) stressed the need to avoid a “formal interview” style and to “carry out ordinary conversations with people in the course of everyday events such as waiting in food lines and social visits”, where she “simply listened to people and gently probed for more information when they volunteered this information” (Hirschfield, 2007, p.4). In this sense, I often adopted more of a probing approach, rather than direct or investigative questioning, sometimes having to wait patiently for an answer or having to return to a given topic at a later date in the hope of greater forthcoming.

4.3.5 Sampling

The people I encountered were mainly as a consequence of non-probability “convenience sampling” in that they were “simply available” to me “by virtue of...accessibility” (Bryman 2008, p. 183), although they generally came from the same sojourner groups that I was associated with. They were international expatriates on temporary or semi-permanent international assignment in the diplomatic and business community usually with children attending local international schools. Contact with a wide range of sojourner groups, through official dinners, receptions, meetings and so on, enabled me to come into contact with a wide number of people through “snowball sampling”, or the effect of meeting people through other people (Bryman, 2008, p. 184), which led to closer ties with many of the families on a social basis and the opportunity to delve more deeply into their experiences. Other convenient sources were other people who could be described as “gatekeepers” (Silverman, 2006, p. 81), who had access to other groups of people that maybe I did not have access to, such as certain membership groups as the “Asian Women’s group” or the “Spanish Business group” and so on, which were a

rich source of perspectives from a different angle. Overall, the kind of people that I came into contact with were all in a similar situation to me as a sojourner and were involved in similar activities dealing with the day to day challenges of sojourners.

4.3.6 Ethical considerations

As pointed out above in section 4.3.3, I eventually opted to carry out my research covertly as a participant in the research setting. It gave me better and more fruitful access to and interaction with participants, it enabled me to carry out both my professional duties and my research at the same time and it enabled me to protect the position of others as “informants” (Silverman, 2006, p. 82).

While carrying out the study in this way involved a lack of complete openness, it also created protection for those encountered casually, and no names or personal details of people observed are included in the study. However, because, in principle, covert research would not be the preferred approach to take in most cases, the ethical considerations in this study have been examined very closely. The Economic & Social Research Council (ESRC) states, for example, in its “Minimum Requirements” for ethical research that:

It is recognised that there are occasions when the use of covert research methods is necessary and justifiable.

(Framework for Research Ethics, Section 1.2.3, P. 9)

In addition, the Framework goes on to define occasions where covert research could be justified:

Covert research may be undertaken when it may provide unique forms of evidence or where overt observation might alter the phenomenon being studied. The broad principle should be that covert research must not be undertaken lightly or routinely. It is only justified if important issues are being addressed and if matters of social significance which cannot be uncovered in other ways are likely to be discovered.

(Framework for Research Ethics, Section 2, P. 29)

The question remains, then, as to whether such an approach in this context is justified. The approach was not adopted lightly, as discussed in section 4.3.3, given

that other options were explored before and I concluded that a mainly covert approach was both justified and the most appropriate in this context. At the beginning of the work assignment I fully expected to be able to gain informed consent and interview people, but I decided against this for the following reasons:

1. As pointed out in 4.2.7, I felt bound to honour the terms of my status in Cuba as an official visitor and did not want to come out as a researcher without permission. Overt data collection would have brought attention to this and permission would probably not have been granted.
2. Foreign residents in Cuba were subject to surveillance and control regarding their daily lives and work activities. Those working in business partnership with the state were particularly vulnerable and openly consenting to participate in a project that examined their everyday life may have caused them problems with the authorities, which may have resulted in arrests. I observed that such everyday problems were very common and I was aware of a number of arrests amongst the sojourner population during my time in Cuba, as indicated in 2.4.10.
3. I found that people were more relaxed in social gatherings and would talk about their experiences fairly freely. However, I also noted that many reacted to direct questioning and became evasive. In order to address the research questions I concluded that it was better to carry out a covert qualitative study and observe casual everyday conversation and habits, rather than to adopt formal, quantitative research procedures.
4. I had regular contact with local Cubans on an official and an informal basis as part of my work and in my non-working life, which was a rich source of data and a key element of the thick description of my ethnography. Surveillance and control was also common for Cubans (Aguirre, 2002, Sánchez, 2010), as described in 2.4.5, particularly for those that came into sanctioned contact with foreign residents. Involving Cubans in formal research procedures would have drawn attention to my research and would have inhibited free speech, as well as putting local people in danger of reprimand or arrest.

5. I was coming into contact with dozens of people, from a range of nationalities including Cuban, on a weekly basis in my daily life. Many were unknown to me and of varying significance for the project. It would have been impossible to gain the consent of the hundreds or more people that I was meeting in the course of my time on location. In this sense, it is me who is the main participant in this project, as an observer, and no informed consent was required of others to participate in any specific task or test – they simply went about their daily lives.

6. This research addresses a significant problem that is of increasing sociological interest and concern. As a result of the growing trend towards international expatriate deployment as a result of globalisation, examining the process of expatriate adjustment is gaining in importance largely because of the cost invested in re-location by employers and the damaging effect that failure and premature return has amongst employees and their families (Black and Gregerson, 1999; Hechanova et al, 2003). A qualitative, first-hand account of the challenges that people face in such a “politically sensitive environment” is lacking and the uniqueness of the circumstances examined in this project gives invaluable insight in to how people cope with international assignments. It is also worth noting that such an account provides a unique perspective from within Cuba on the reform process and the historic changes that are taking place in the *rapprochement* between Cuba and the United States, which will have an impact on life on the island.

In short, I concluded that covert research in this context was the safest and most beneficial way to get rich authentic data in order to analyse the key issues at hand, while at the same time, ensuring the protection and the interests of people in their everyday life. While this type of research is uncommon, it is not unheard of, and it is of interest to note in what kind of situations other studies have opted for a covert approach. Patrick (1973), Ditton (1977) and Adler, (1985), for example, penetrated illicit and potentially dangerous settings, involving violent gangs, theft and drug dealing, in which researchers need to conceal their real objectives in order to preserve their own wellbeing and conceal the identity of the participants. Another study (Holdaway, 1982), is based on research into a police service in which the author was an employee and a participant, which he conducted without the consent

of his superiors. While this is, without doubt, controversial, the researcher was able to gather insight into the informal interaction between officers, which may well not have been included in an official study. In contrast, Mattley (2006) describes how she obtained permission from a sex fantasy phone supervisor to conduct research amongst callers, but did not gain consent from the callers (though protected their identity). Likewise, (Humphrey, 1970) carried out a covert study on mainly heterosexual men who sought homosexual encounters clandestinely by posing as an accessory look out in public toilets, while protecting the identity of the participants.

Thus, there are a number of cases where various forms of covert research have been used with some justification, whether because an unusual setting would be difficult to access otherwise, or valuable and sensitive data would be uncollectable, or where identity needs to be protected. Coupled with this, in section 4.2 above, we have seen the type of difficulties and restrictions researchers have faced in Cuba itself and the type of strategies they have had to adopt in order to obtain data. In this sense, in the current study, my immersion as researcher in the setting provided a rich insight into daily life, and the need to protect identity, meant that I considered that a covert approach was justified.

4.3.7 Research questions

As the research project was an ethnographic study, I did not limit my focus of enquiry to specific research questions from the outset until I knew more about daily life for expatriates in Cuba and I envisaged that the data would influence the research focus fairly early on. From the outset, however, the challenges of adjusting to Cuba were tangible and from very early on in my stay in Cuba, it was apparent to me that sojourners struggled to adjust to daily living conditions and frequently outlined the kind of problems they were experiencing and, indeed, that we were experiencing as a family, as well.

I organised my observations and the comments I received thematically and I was able to identify relevant aspects of theory from the literature review and to focus on specific areas for investigation. From this, I devised the following research questions:

1. What aspects of adjusting to a new environment do expatriates identify as the most challenging on international assignment?

2. How do they deal with the challenges they face?
3. How can international organisations help to prepare employees and their families for an international assignment?

Some of the challenges were of a general nature relating to the issues of relocation, while others were due to the complex and difficult context of a politically sensitive environment. For example, while it is common to miss family and friends in a new location, it is fairly unusual not to be able to communicate with the outside world and to be able to do this without being monitored. The final question was selected because it became clear to me that moving to a politically sensitive location requires special support and preparation, as with most assignments, but particularly in this case. I used these questions to classify data in broad terms of how sojourners described their everyday lives and how they adjusted to their new context, as well as the kind of issues that could inform recommendations for international organisations in deploying expatriate staff.

4.4 Dealing with subjectivity

One of the biggest challenges that I faced in this research project was the endeavour to ensure reliability in my data and validity in my conclusions, because of the nature in which I conducted the research, judging that it was both better and safer not to reveal my role as researcher, for the reasons explained in the previous section. As we have seen from the studies discussed in section 4.2, doing qualitative research in such circumstances as Cuba has proved extremely challenging and the onus is on the researcher to demonstrate and reflect upon the nature and impact of his or her subjectivity.

4.4.1 Reliability and Validity in qualitative research

According to Silverman (2006), reliability and validity are terms that relate to whether a concept is consistently (reliably) measured and whether the measure is a true (valid) measurement of that concept. Accuracy in these areas will mean that studies can be replicated in other situations and findings can be generalised and this is a central concern of quantitative research. One danger with qualitative research is that it becomes anecdotal, built on the impressions and possibly limited perspective of the researcher, which challenges the validity or “truth” quality of the research and which

has led many quantitative researchers to “downplay the value of the former” (Silverman, 2006, p. 47).

Some researchers suggest, however, in response, that qualitative studies should be “judged or evaluated according to quite different criteria from those used by quantitative researchers” (Bryman, 2008, p.377). At the heart of this is the notion that there is not only one true account of social reality and that events are open to interpretation from different perspectives. In this sense, a qualitative approach lends itself to an “epistemic process” (Blommaert and Jie, 2010, p.37, in which

... we make sense of a setting using our own interpretive frames, concepts and categories, and gradually shifting into new frames, making connections between earlier and current events, finding our way in the local order of things.

(Blommaert and Jie, 2010, p. 37)

Added to this is the fact that some situations, for a wide variety of reasons including political, social, ethical and so on, are not open to conventional quantitative research methods. Furthermore, Silverman (2006) lists a number of criticisms of quantitative research which suggest superficiality and disconnection from everyday life:

...the quantitative desire to establish “operational” definitions at an early stage of social research can be an arbitrary process which deflects attention away from the everyday sense-making procedures of people in specific milieu. As a consequence, the “hard” data on social structures which quantitative researchers claim to provide can turn out to be a mirage.

(Silverman, 2006, p. 42)

In this sense, if quantitative researchers are to recognise the limitations of how they can operationalise problematic or unreliable concepts, this “would simply rule out the study of many interesting phenomena relating to what people actually do in their day-to-day lives, whether in homes, offices or other public and private places” (Silverman, 2006, p.34). The current study falls into this category in that it explores a highly sensitive political situation in a tough economic and social environment with many day to day challenges for sojourner adjustment. The lessons learned and experiences described here can be said to offer a valuable contribution to the challenges of expatriate adjustment and the factors that global organisations need to take into account in the selection process for expatriate assignments.

4.4.2 Reflexivity

Bell (2013) makes a valuable distinction between “participant reliability”, in terms of the “authenticity of participants’ accounts” (Bell, 2013, p. 115) and “researcher reliability”, in terms of “neutrality” (ibid, p. 117), or impartiality. I maintain that, by being “reflexive”, I can explain where I am coming from as a researcher, so that whoever reads my account can judge the validity of my analysis and conclusions in relation to how I also describe the context in which I was in. Likewise, in terms of reporting what people said to me, I recognise that it is quite possible that I have misquoted or misinterpreted what people have said and, in this sense, “I speak only for myself” (Holliday, 2005, p. 306), and can only say that this is what I believe people said to me. Also, the reflections that I made were mine and born of my experience as participant and researcher in the context. This is the essence of sociological imagination, in which the researcher makes connections between “personal milieu”, or particular experiences, and wider “social structure” in the explanation of where the society in question “stand(s) in human history” (Mills, 1959, p. 5). What is said in a context can be explained or interpreted in different ways. In this sense, I would argue that my engagement with that context was unique, because, although other sojourners also had a rich experience of daily life in Cuba like myself, their first-hand accounts maybe would not have the benefit of insight gained from studying the body of research literature that I have brought to bear on my own reflections. Furthermore, “letting voices speak for themselves” does not eliminate subjectivity, as the researcher can be seen to be influencing the “exact words” by sharing the context (Mazzei and Jackson, 2012, p.745), explained here:

Letting readers “hear” participant voices and presenting their “exact words” as if they are transparent is a move that fails to consider how as researchers we are always present and by our own exploitative research agendas and timelines. Even those accounts of voice that are more critical and that attempt to equalize and democratize the research process may do little to make transparent how decisions are made to “give voice”: Who decides what “exact words” should be used in the accounts? Who was listened to, and how were they listened to?

(Mazzei and Jackson, 2012, p.745)

In other words, “researchers can never claim to be speaking for anyone but themselves and cannot claim to be representing the voices of others” (Holliday, 2005,

p. 307), and this needs to be recognised through reflexivity and the assumptions that underlie voice and discourse in qualitative accounts.

4.4.3 Voice and discourse in and about Cuba

As we have seen, while “as researchers we are always present” (Mazzei and Jackson, 2012, p.745), one aspect of trying to address the issues of reliability and validity in participant observation is the treatment of “voice” in the presentation of people’s accounts in the study. Holliday stresses the importance of “putting aside established descriptions” of phenomena that may influence the researcher’s account, a process he calls “bracketing and making the familiar strange”, in order to see through “the discourse and ideologies of culture” (Holliday 2011, p.31). This is required in order to not be influenced by “common sense assumptions” or “taken-for-granted realities” about phenomena in order to treat data without “prejudices” that “will colour the viewpoint” of the researcher (ibid). An example of this, in this context, might be the whole notion of the Cuban revolution and what it stands for in history, which may clearly be influenced by a person’s political persuasion. According to my own observation, for instance, many visitors come to Cuba in romantic pursuit of a society embodying equality and social justice. They are delighted by the “Che” Guevara hats and t-shirts available in tourist shops, the revolutionary billboards on the side of the road and the potted histories of the revolution on sale in the squares in the central tourist areas. Others may come with other notions that counter this ideology, but it is unusual for any visitor anywhere, let alone Cuba, not to arrive on location with at least some preconceived notions gained from news coverage of what to expect in the situation they are about to enter and, indeed, this may be the very reason that they have chosen the location.

Holliday outlines a number of other ways of dealing with the influence of the “voice of the writer” (Holliday 2007, p. 166) or “the discourse of the researcher” (ibid., p. 165) in qualitative research. He outlines how the researcher must avoid “letting her own language run away with itself” (ibid., p. 64) and avoid influencing the reader by presenting an observation by using evocative language to create a certain effect. He gives an example of this:

An example of this can be seen...where, for example, Herrera writes “with cast down eyes began to speak”...“Cast down eyes” on this context seems to me to

imply deference. I do not know whether the researcher (a) knows that the student is lowering her eyes out of deference and intends to communicate this, or (b) does not know and is therefore allowing her own language to run away with itself. A more neutral description would seem to me to be “with eyes looking down”. This is a difficult issue which raises the discussion of whether description needs to be or should be neutral anyway, and how far it can be neutral.

(Holliday 2007, p. 64)

One can easily see, for example, how the dramatic effect of a simple observation such as, “He *walked* into the room” could be altered by using alternative language such as “He *bounded* into the room” or “He *stumbled* into the room” and could encourage a certain attitude towards an event or character. In order to address this, Holliday proposes a “strategic, technical detachment from, rather than an emotional joining in with, the Other of the people in the research setting” (ibid. p. 167):

There is a delicate balance to be maintained here. On the one hand, as an indisputable part of the setting she has entered, the researcher, with all her cultural and ideological baggage, must “come out” and reflexively deal with this. On the other hand, she must exercise immense constraint in what she reads into what she sees and hears.

(Holliday 2007, p. 167)

He then goes on to describe a range of writing techniques, broadly described as “strategic, technical procedures to ensure caution and restraint in interpretation” and creating “textual room” in order to make clear the distinction between what the researcher thinks and sees or hears (p. 167). Other techniques involve “creating cautious detachment” (p. 167), or “setting a cautious scene” (p. 168) through “hedging” (p.168), “softening” (p. 168), or “statements of restrained approximation” (p. 168), or “making restrained sense” (p. 169), all of which add an element of doubt and distance to the writer’s account and remind us that what we are reading is an *interpretation* of the context that the author is observing. This involves using linguistic devices that leave some doubt or room for doubt, such as “appears”, or “seems”, or “in many cases”, or “data such as”, and so on, as the author explains:

The key here to make appropriate claims is expressing quantity without precise amounts – “often” without saying how often, “many” without saying how many, “reduced” without saying how far reduced, and “poor” without saying to what

degree. The writers thus communicate that they have a reserved sense of the setting without getting into specifics that they cannot validate...

(Holliday 2007, p. 169)

Taking note of this, I have paid particular attention to how I have expressed my own views in this project and tried to be honest and impartial as possible and not align myself to any particular worldview regarding political systems. However, as I have said in my coming out as researcher in 2.2., Cuba has a special place in world history and politics and creates interest and polemic because of it. In this sense, as well as my own on-the-ground account and “thick interpretation” (Denzin, 1989), there is much value in bringing to light or “pointing to” (Holliday, 2007, p.129) voices from different sources, as described in section 2.4, as well as reading between the lines in the reports of resident journalists on the island and noting as much of what they do not say as what they do say.

4.4.4 Internal validity and reliability

Another way of addressing subjectivity in qualitative research is to seek *internal* validity and reliability, so that it can be regarded as “trustworthy” and “authentic” (Bryman, 2008, p. 377). “Credibility”, for example, can be achieved by a researcher testing out findings on participants in the research, either by asking them to corroborate findings (“respondent validation”) or by cross-checking observations and findings through a variety of sources (“triangulation”) (Bryman, 2008, p. 377). Also, the “transferability” of findings to other settings (generalisability) may be enhanced by the provision of detailed descriptions of the context and behaviour, while, “dependability” (reliability) could be served by ensuring that detailed fieldwork notes and interview transcripts are available for “audit” by peers (Bryman, 2008, p. 378). Finally, “confirmability” or “objectivity” could also be audited by peers to ensure that the researcher has “acted in good faith” and “has not allowed personal values or theoretical inclinations manifestly to sway the conduct of the research and findings deriving from it” (Bryman, 2008, p. 379). Likewise, questions about the authenticity or impact of the research could be explored, as to whether the research fairly represents an appropriate range of viewpoints within the social setting or whether it has influenced participants in their understanding or behaviour.

As a response to this, I have included a detailed description of the historical and social context of Cuba in Chapter 2, including its current political and economic influences, which I draw upon to explain my observations in Chapters 5 and 6, along with the research on sojourner adjustment. I also include reference to a range of independent sources, whether in the “blogosphere” or independent international media or through triangulation and respondent validation during participant observation, in order to demonstrate different viewpoints. Furthermore, with my field notes I gathered a wide range observations and views to ensure consistency and reliability over a wide range of contexts. These highlight the places I visited and the events I participated in the course of my work and in my social life, whether meetings or receptions with other sojourners and the local population and these are reflected in the cases that I recount in the next chapter to capture a sense of “verisimilitude” of the context (Holliday, 2007, p.75), from which I build up a “thick description” (Geertz, 1973) of sojourner life. This last point is important, because “thick description” is a key technique in ethnography, which “involves piecing together interconnected data to build a picture of what is going on” (Holliday, 2011, p.29) from “different angles” (Holliday, 2007, p.78). In this sense, it is more than “triangulation” in that it does not seek to corroborate an observation, but more to explain it from a certain viewpoint, as Holliday (2005) points out:

Whereas triangulation is a more post-positivist process of checking “truth”, thick description is a process of getting at increased richness and showing interconnectedness. It is the strategic rigour with which the interconnecting voices of thick description are presented that gives qualitative research and the use of narrative its validity.

(Holliday, 2005 p. 308)

Thick description and the way I used it in the study is described further in section 4.7, where I describe how I presented and analysed the data from my research.

Overall, then, the degree to which the criteria of validity and reliability are of importance in research, rests largely on the meta-theoretical approach to social reality. A positivist approach would emphasize the importance of objective criteria, in that it seeks to discover and test out certain elements of what a researcher perceives as an external and constant social reality and thereby provide assurance about the

generalisability of the findings. On the other hand, a social constructionist viewpoint would de-emphasise the importance of replicating conditions that assume a single social reality and would concentrate on describing and analysing behaviour within a particular context. In this sense, we are reminded that “chaos is the normal state of things” and that we are aiming to “describe and analyse complexity” (Blommaert and Jie, 2010, p. 25). This research project seeks to explore the complexity of sojourner life in Cuba.

4.4.5 The issue of “generalisability”

By its very nature ethnography is context-related and there are limitations to the extent which the findings of a study could be generalised to other contexts or populations. As Bryman (2008) points out:

It is often suggested that the scope of the finding of qualitative investigations is restricted. When participant observation is used or when unstructured interviews are conducted with a small number of individuals in a certain organization or locality, they argue that it is impossible to know how the findings can be generalized to other settings.

(Bryman, 2008, p. 406),

This is made doubly problematic with the imprecise nature of sampling, which in qualitative research is often dependent on access to the social setting and based on convenience, as described in the current study.

On the other hand, as LeCompte and Houston (1982) point out, “generalization is warranted only where subjects have been sampled randomly from the entire population to which the findings are applied”, and they caution that “this statistical condition obtains in few cases”, and that “experimenters and survey analysts more commonly depend on design controls, sample size, and assumptions of equivalence to legitimize their generalizations.” For this reason, the authors suggest the use of “comparability” and “translatability” of findings in ethnography rather than outright generalisability.

Comparability requires that the ethnographer delineate the characteristics of the group studied or constructs generated so clearly that they can serve as a basis for comparison with other like and unlike groups (Wolcott, 1973). Translatability

assumes that research methods, analytic categories, and characteristics of phenomena and groups are identified so explicitly that comparisons can be conducted confidently. Assuring comparability and translatability provides the foundation upon which comparisons are made. For ethnographers, both function as an analogy to the goals of more closely controlled research: generalizability of research findings and production of causal statements.

(LeCompte and Houston, 1982, p. 34)

In this sense, the context of the research setting, such as another politically sensitive location, and the nature of the research group, such as international sojourners on location, could be a basis for translating or comparing the findings from this research project. This would also add validity to the views and experiences expressed and described in this ethnography.

Another approach is to emphasise the importance of generalising to theory, rather than population. As Blommaert and Jie (2010) suggest:

... generalisation is perfectly possible, and it depends on the theoretical apparatus that you bring to bear onto your data. Thus, in a situation in which your data are classroom observations about response behaviour by pupils, your data can be framed in, for instance, a Marxist perspective in which social class distinctions are central issues. Our analysis of the data will then focus on features in the data that speak to social class distinctions, and your generalisations will be about such class issues.

(Blommaert and Jie, 2010, p. 12)

In this sense, it is theoretical reasoning that is generalised in qualitative research, rather than the findings themselves. The theoretical background to this study of sojourners in Cuba is derived principally from acculturation and expatriate research and literature, outlined in Chapter 3, which treats adjustment as a multi-dimensional or multi-faceted phenomenon involving psychological and sociocultural factors (Berry, 2006; Ward et al 2001), situational factors (Black, 1990; Black et al 1991) and non-work factors, such as the role of the accompanying spouse and the expatriate family (Harvey, 1985; Black and Stephens, 1989; Black and Gregerson, 1991; Haslberger and Brewster, 2008; Lazarova et al, 2010). It is also perhaps wrong to assume that statistical findings in quantitative research are fully generalisable

either to the population under study or to populations in different locations, in the same way that it is to assume no generalisability is possible at all in qualitative research. Williams (2000), for example, calls for “moderatum” generalisations, in which certain aspects of a case study (i.e. behaviour in similar situations) can be generalised. So, in the current study, certain aspects of adjustment in new environments could have relevance beyond the research setting and, in fact, it would be unlikely that none of the data were to have relevance to people’s experiences in similar situations, such as on international assignment in another location.

4.5 Data collection

4.5.1 Introduction

I collected data from a variety of sources, as set out below, in order to build a comprehensive understanding of the context and the daily life of sojourners in Havana. The generally covert nature of the research required a sensitive approach to observation and data recording and I cast a wide net of interactions in order to ensure greater objectivity and face validity in the study. Here is a description of the methods used.

4.5.2 Participant observation

As in other covert studies mentioned in 4.2.6, most of the data for the project was gathered through participant observation, through the observation of behaviour and through comments made by the individuals who I encountered during my sojourn in Havana over three years. Many of the encounters and conversations that I had with the people who I met were a rich source of new information about the context and the experience of sojourners. My ability to converse in English, Spanish and other languages also increased access and widened the perspective of the research. Shortly after my arrival, an opportunity arose to get more involved with sojourners through the main international school in Havana by volunteering to be a facilitator in a project initiated by the school on the “transition” of new families on arrival and decided to get involved in the group as a facilitator. This involved meeting parents and teachers in drop-in sessions, listening to their experiences and feeding back notes to the group of co-ordinators to draw up a “transition policy” for newcomers. This was of interest to me as, despite the long experience I and my family had had in re-locating to new countries and continents and the fact that we had lived in Latin America before and spoke fluent Spanish, we were finding Cuba particularly

challenging to adjust to, as were many others. I was intrigued as to why this was so and how people coped and this prompted me to get involved in the transition project.

During my sojourn, I worked closely with Cubans and international expatriates and made many personal contacts in social life. I attended numerous official meetings and events with Cubans during his work and was able to meet Cubans unofficially through other activities. My participation in sojourner and school life led me to meet a wide range of people from many countries on short term location of a few years or longer and included diplomats, business people, foreign correspondents, students, professional visitors and tourists. Contact with individuals could be one off encounters or repeated encounters with the same individual through work, school, social and friendship networks, and just living the life of a sojourner, immersed in the context. Data gathered in this way was fairly unstructured and disorganised, although I organised my data into separate journals, which helped me to order and reflect upon the information (see the section below on “Field notes”). The longer conversations developed into a form of unstructured interview, with the sojourner raising issues and points that I had not considered or was not even aware of and these form the main focus of the cases I present in Chapter 5. Being involved in and experiencing the life that people led helped me develop a depth of knowledge and a sensitivity or empathy with people, both local and international, and also helped me to understand different perspectives on everyday social reality other than what was presented to outsiders through the state media or through the tourist industry and popular journalism.

4.5.3 Field notes

I kept several journals during my time in Cuba, which helped me to organise my data, draw out different perspectives and reflect on what I was experiencing. I kept one fairly open and general journal, called *My Notes on Cuba*, which was a combination of my own observations on the local context and where I also included comments from Cubans and sojourners on aspects of daily life. I updated the journal as a response to an observation, rather than on a daily basis, and the notes and reflections were written after events and encounters and not in real time.

Alongside this, I also kept a journal called *Notes on Context*, which focused on collating *realia* and facts and opinions about Cuba. This included media reports,

official announcements and official statistics from third party sources, relating more to the macro-context of what was happening on a political, economic and social level in Cuba. Through this I was able to pick up themes that I had noticed in my observations and “triangulate” (Bryman, 2008, p. 379) this information from alternative sources, such as news items or blogs in order to check my understanding and manage my own subjectivity.

I also kept a journal to record observations and conversations with sojourners, *Notes on Sojourners*, which helped me document encounters and comments on the life of a sojourner and the challenges that they dealt with in adjustment on a day to day basis. This journal was the main source for the cases I present in Chapter 5.

Overall, then, the strategy was to collate and record data from a variety of sources in the field and cross check and triangulate it across the sources and the journals in order to seek greater objectivity. My covert role enabled me to penetrate daily life fairly deeply in this process, but there were limitations in that comments were reported after events.

4.5.4 A complex of voices from Cuba

Much is written about Cuba from different perspectives both officially and informally as analysed in section 2.4, and I have included them for a number of reasons. Firstly, because it is a means of understanding the way Cuba is organised through official documents and information sources, such as official news media, the Cuban constitution or the Cuban National Statistics Office. Secondly, because it provides insight into certain aspects of daily life from a wider range of sources than I had access to, whether through blogs on daily life by Cubans, or commentaries by resident foreign correspondents and international media on wider views on what was happening in Cuba. Finally, by ensuring that my background reading was broad and varied, taken from all points of view (see Appendix C), I was able to provide balance to my own observations with the intention of “reducing personal power” (Holliday, 2007, p.116), both mine and the official state media, and to create “a complex of voices” (ibid p.133) by giving voice to other sources about Cuba and by providing information and views from a variety of perspectives in a context where information was both limited and highly influenced through official sources. This process was an important part of creating the thick description for the ethnography and could

contribute to verisimilitude and wider validity, because it presented a view of life from different angles and different worldviews. Examples of sources I accessed and the perspective they brought to the context are attached in Appendix C.

4.6 Data presentation and analysis

4.6.1 Introduction

The aim of this section is to “show the workings” (Holliday, 2007, p. 42) of the research, in which I describe what I did with the data that I collected, how I presented it and how I analysed it for further discussion in the conclusion of the study.

4.6.2 Organising the data

Most of the data for the project was gathered through participant observation, although many of the encounters and conversations that I had with the people who I met, as mentioned above, were similar to unstructured interviews and were a rich source of new information about the context and the experience of sojourners. With this data, along with the encounters I had through my work and social life, I was able to record the most frequent concepts and topics and identify themes to be investigated further and which themes would inform the specific research questions.

Because of the participative nature of my involvement in the research project and the variety of methods used to collect data, largely relying upon an inductive approach, data collection and analysis were influenced by Grounded Theory (Glaser and Strauss, 1967) and the methods and techniques of Thematic Coding and analysis common to qualitative research (Richie et al, 2003). A “topic” or “concept” (Straus and Corbin, 1998, p. 101) is identified in this study as a noun or noun phrase which participants mentioned as a source of stress or dissatisfaction, or “stressor” (Haslberger and Brewster, 2008), such as “the lack of food”, or “delays in getting a decision” and so on. This could also be expressed as a source of satisfaction, such as “help and support”, or, in the adjustment process, as an indication of what facilitates adjustment, such as “speaking Spanish” or “living in another Latin American country”. The frequency of a topic or concept, and often the intensity in which it was expressed, were the main factors in selection. This process of “coding” (Straus and Corbin, 1998), or identifying salient topics and organising them into categories, used for this study is summarised in Appendix D. In Step 1, for example, I list some examples of categories of challenges that sojourners mentioned at the

beginning of their stay and getting used to the new environment, such as “setting up home”, “finding where things are”, and then those that became more of a concern as time went on, such as “the informal economy” or “illegal vendors”. I grouped all of these into a common descriptive category, such as “Everyday life”, “Authority” or “Social Life” and so on depending on their nature. In Step 2, I found it useful to categorise these according to theoretical definitions from previous research studies, such as “domains of adjustment” (Black and Stephens, 1989), or “social support” (Adelman, 1988; Ward et al, 2001) or “culture distance” (Babiker et al 1980; Ward and Searle, 1991) which gave me an indication of their source and nature and which would enable me to develop sub-themes for deeper analysis in Step 3. Later on, it became apparent to me that certain categories, which may have taken on initial significance, could be merged with other categories to form broader ones. The category of “settling in”, for example, subsided in prominence once sojourners had settled, but the challenges of daily life continued.

In order to explain the significance of this data, I then examined *how* the topics were talked about, whether through adjectives or descriptive phrases, which enabled me to identify the most frequent “themes” (Halliday, 1994), such as, “The informal economy dominated access to essential goods”. Examples of this are listed in Step 3 in Appendix D. Then, as illustrated in Step 4, by drawing on this analysis, my understanding of the context and knowledge of theory and previous research on adjustment, I was able to use “sociological imagination”, (Mills, 1959), in order to offer my own interpretation of what I considered to be the main underlying themes of *why* sojourners experienced challenges and *how* they adjusted to them. This final phase recognises the need to go beyond topics and categories in order to offer an explanation of what is happening and retain a sense of the context, which is regarded by some as a limitation of Grounded Theory (Coffrey and Atkinson, 1996).

4.6.3 Presenting the data

Through the process of data coding and organisation I was able to bring out the main themes of the ethnography through a “thick description” (Geertz, 1973, p.9) of the adjustment process of sojourners. In order to present and analyse the findings of the study in a way that preserved the vitality of the context and maximise participant voice in my thick description, I selected a range of cases of individuals (Step 5) that would best illustrate the underlying themes of the study. Because of the covert

nature of the study and my role both as participant and researcher, I have found the need to treat the issue of voice with care. This is particularly important in this project because all the events, encounters and comments from other participants were all anonymously expressed through my voice, either from an emic perspective from within the setting as participant in daily life and as a participant observer, on the one hand, or from an etic perspective from beyond the setting as commentator and researcher. For this reason, I have introduced separate sections in the presentation of the data in Chapter 5 through a range of cases, in which I have striven to be as specific as possible about who said what to me. The cases in each theme are followed by an analysis of the accounts, in which I examine the comments, as researcher, in relation to the research context from Chapter 2 and research literature from Chapter 3, and then a “comments” section in which I offer my own reflections, as researcher, from beyond the setting. In this way, I have sought to create “a complex of voices” (Holliday, 2007, p.133) from within and around the research setting outlined in Chapter 2 in order to provide a richer perspective on daily life.

4.6.4 Building thick interpretation and the use of sociological imagination

My thick description, then, of sojourner life on the island is comprised of a number of elements. First, in Chapter 1, I have stated my personal narrative and relationship with the research context, including my reason for being in Cuba, my professional function and my reasons for carrying out the research. I have also been clear about my research agenda in my engagement with new locations and my worldview in relation to the Cuban context, all of which influence my own interpretation. However, I counterbalance this with a detailed account of recent Cuban history and current issues in the context in Chapter 2. I do this in order to explore how the political and social structures, in my analysis, impinge upon everyday life through the use of sociological imagination. I also outline Cuba’s geopolitical position and economic situation in order to provide understanding of the wider influences on the context. I include references and comments from different perspectives in order to give as balanced a view as possible of how the Cuban context is seen from within and from outside Cuba.

Second, I present my data as cases in order to build up what I considered the vibrant core of the thick description, because it is about what sojourners experienced (albeit transmitted through my eyes) how they described everyday life and their interactions

with each other and the local population. I organised these thematically, selected on the basis of frequency and “force of expression” (Ryan & Bernard, 2003) and in order to respond to the research questions of what challenges sojourners faced from their own point of view and how they coped with them.

Third, I interpret the descriptions and comments, on the one hand, by drawing on references both from within and outside Cuba included in Chapter 2, and, on the other, with reference to previous sojourner research and theoretical considerations outlined in Chapter 3. In this sense, while I explain my analysis and my interpretation of everyday life for sojourners in Cuba from my own point of view by selecting from the data, I also challenge myself in what I observed by looking at things from different perspectives and not just relying on my own immediate interpretation. Thus, from my point of view as participant and researcher, and, by drawing upon my substantial knowledge and experience of the context, the intention here is to build up an interconnected and credible picture of everyday life of international sojourners in Cuba.

Finally, as we shall see in Chapter 6: Discussion of Key Findings, drawing on my thick interpretation of daily sojourner life and my use of sociological imagination, I am also able to describe a model for adjustment in international sojourners, which could be used to analyse “culture shock” and pinpoint some of the key issues for international organisations when dealing with re-location policies and issues.

Chapter 5. Presentation of data

5.1. Introduction

As the research project was an ethnographic study, data was collected inductively through participant observation, initially without the focus of pre-determined research questions. This was because of my limited knowledge of the context from the outset and my approach was to collect details examples of what people said, where and when, keeping specific details of individuals that I would eventually select as cases, which I present in this chapter, although protected by anonymity. In this way, it was possible to explore sojourners' construction of their experiences without the constraints of a priori categories driven by specific research questions from the outset, which I could then explain through sociological imagination by relating them to the wider context.

Once I knew more about the people's challenges of adjusting to daily living conditions Cuba, I was able to categorise them and explore the strategies they used to overcome them, which led to the specific research questions outlined in the previous chapter. The following section, section 5.2, looks at the challenges sojourners described in their adjustment to the local environment in Cuba, while section 5.3 focuses on the adjustment process and how sojourners dealt with the challenges that they said they faced. The individual cases were selected for the nature of the challenges or the experience of adjustment that they described in relation to the main themes. I then present the main challenges in table format in order to be able to offer an analysis of the cases. The intention here is to show how participants construct their experience of Cuba and I present people's experiences as honestly as possible, albeit in my own words, and relate these to the context of Cuba. From this, my intention is to create a thick description of everyday life for sojourners living in Cuba, which I use in the following chapter to discuss the process of "culture shock" related to this research context. The result is a mixture of voices from the context – sojourners' voices and Cuban voices – which need to be contrasted with voices from outside my own experience of the context, whether within or outside Cuba, through blogs, media reports and research studies, which I also described, in section 2.5 on perspectives, and my own voice as researcher. Researcher voice becomes prominent in the in the analysis and commentary sections following the cases, in which I draw on previous chapters relating to the setting (Chapter 2) and

research (Chapter 3), in order to make sense of the context through sociological imagination. I include more detail on this process in the introduction to sections 5.2 and 5.3, where I explain how I present and analyse the data in each section.

The inspiration for approaching the presentation of the data in this way comes from two sources. First, Gert Baumann's *Contesting Culture*, (1996), which explores the relationship between a "dominant discourse" within a social context and the "structures of power and inequality" in the reification of a cultural setting to the benefit of those who occupy positions of authority. Second, Adrian Holliday's work on "aspects of cultural reality" (Holliday, 2011) and "a grammar of culture" (Holliday, 2013), which describes the underlying "particular social and political structures" (Holliday, 2013, p.2) of a given society manifested in aspects such as "nation, religion, language and economic system" (ibid). In the context of Cuba, I would add aspects such as recent history (e.g. the Cuban social revolution, 1953-9), the particular brand of revolutionary ideology exercised by the Cuban regime and the specific international geopolitical implications that have emerged in the aftermath of a communist revolution within the sphere of influence of a major Western power. All of these factors and the way the context is described by people who live in it all combine through the process of sociological imagination, which seeks to explain "the meaning for 'human nature' of each and every feature of the society we are examining" (Mills, 1959, p.6) and, in this particular case, the factors influencing the everyday experiences in the life of international sojourners in Havana.

5.2 Focus on challenges

In order to address the first research question, this section presents and analyses cases in which sojourners describe the main challenges they experienced when relocating to Havana, both with respect to the local environment and to the changes that they had to make to their lifestyle as a result of relocation. They are presented here together, as they address the notions of "stressor" or increased "demand" on individuals, which are key concepts in determining adjustment responses (Haslberger and Brewster, 2008) within a more general "stress and coping approach" to adjustment described by Ward et al (2001). This approach conceptualises cross-cultural transition as a psychological process "a series of stress-provoking life changes that draw adjustive resources and require coping responses" (Ward et al, 2001, p. 37). In this sense, moving to a new environment is considered a stressful

process similar to other life changes, such as moving house or changing job and individual factors such as personality, personal coping styles, locus of control, tolerance of ambiguity, feelings of homesickness and loneliness, sense of loss, and degree of social support are considered important in the adaptation process, as indicated in section 3.3. Furthermore, as Black et al (1991) argue, cross-cultural adjustment is treated in this study as a multidimensional concept, “cutting across domains” in sociocultural life (Haslberger and Brewster, 2008), rather than a unitary phenomenon applicable to all individuals. In this respect, adjustment also has a sociocultural aspect (Ward et al 2001) and the particular circumstances of individuals also come to the fore and the lifestyle changes that they experience as a result of relocation, particularly in the case of accompanying spouses and families (Harvey, 1995; Caligiuri et al, 1998). These theoretical underpinnings are explained in full in Chapter 3: Literature Review.

I have organised and presented the data in the form of cases in four thematic sections in 5.2.1, 5.2.2, 5.2.3 and 5.2.4. Within each of these sections I first present individual cases of sojourners and Cubans who I met in my time in Havana, characterised by a quote from each one, which, I judged, summed up the challenge that they were explaining to me. In the first column of the table, entitled “Challenge”, I lift out from my report of each case what I identify as the key issues that each case had in their adjustment process and, in the second column, entitled “Effect”, I list what impact these challenges had on the situation of the individuals selected. In the final column, entitled “Analysis”, I relate and explain the challenges identified to and within the wider research context, seen from my perspective as researcher and drawing on my experience of life in Cuba, as a participant in everyday life, and on my knowledge of the research literature on adjustment. Finally, in the section entitled “Comments”, I consider all the elements and provide a summary analysis of the whole section from my perspective as researcher, which are then discussed further in the final two chapters on Discussion of Key Findings and Conclusion, along with all the other sections

5.2.1 Living with scarcity

5.2.1.1 Introduction

Setting up home and dealing with daily life are amongst the principal challenges that sojourners have to deal with when they re-locate and this is even more so in the case

of Cuba, because of the difficult economic circumstances of the island, as described in Chapter 2. While the poor economic climate of Cuba has created considerable scarcity of basic foodstuffs and materials, felt most keenly by the local population, the existence of a dual currency has engendered the spread of a complex informal economy which serves to overcome shortages for the right price. The cases presented in this section highlight the challenges of settling into daily life for sojourners, from their perspectives, and provide insight into the social consequences of an embedded informal economy both for sojourners and for the local population.

5.2.1.2 Naomi

“If there’s cement, there’s no sand...if there’s cement and sand, there are no bags to put it all in!”

Naomi was from an African country and had arrived in Cuba about a year previously to when I met her. She had diplomatic status and had been provided with a house by the authorities that was rundown and that she needed to refurbish. She spoke fluent Spanish and had lived in Latin America before. She related to me that it was common for people to have to make improvements or find new accommodation at the beginning of the sojourn and that this dominated life in the first few months. Also, as she explained, housing in Havana was in short supply and little building or repair work took place due to a shortage of appropriate materials. She said that she had found that the lack of building materials, such as nails, sand, glass, basic tools and so on, had caused delays in repair work, as labourers were left waiting for some key material that had run out. Naomi described how she had to go hunting for sand or cement, or scour the shops looking for a basic tool, such as a drill or a hammer. As she explained, sand was in limited supply, so glass was in short supply and could not be mixed with cement to restructure a wall. “If there’s cement, there’s no sand...if there’s cement and sand, there are no bags to put it all in!” she explained, referring to the inconsistency in supply of basic materials, which seemed to frustrate her. She described how their heavy baggage consignment could not be delivered and stored, because there was no wood available in the shops to make palettes to protect the boxes from flooding in the garage. The only way to find wood, she said, was to look for it on *el mercado negro* (the black market).

Naomi also explained to me that furniture was in short supply, because of the lack of fabric, which came periodically from Europe or Canada, and that very little was

available at the time she arrived. As her husband was a diplomat, she mentioned that it was possible to order new furniture and electrical goods through his embassy with special permission from the Cuban government, but enough goods for a full shipping container were required to make the transport charges worthwhile and she had had to wait until other goods were ordered by her husband's colleagues. She explained that she had had to wait a year for a new fridge and washing machine to replace the old and broken ones. She described how her furniture was in such bad condition, with torn covers or no covers at all, that she had asked her husband to buy some sofa and armchair covers when he went on a business trip overseas, so that she could ask local furniture makers to produce a three piece suite. She described how he had constructed the furniture from inside out to fit the covers from cheap wood and foam rubber, guiding himself with the picture of the sofa on the wrapping. According to Naomi, the only problem was the shortage of wood and foam rubber for him to complete his work and she said that she had to wait several months to get a reasonably comfortable sofa. Naomi described other ways of getting furniture. Some, she said, she had got as "hand-me downs" from other colleagues and embassies as people left their posting, others she got from garage sales from sojourners selling off things when they were leaving, often at quite high prices. She also described how she had managed to buy glassware and crockery from Cubans, who were selling what they could to earn the dollar equivalent convertible currency (CUCs), and blinds and garden furniture from local craftsmen who could come and make things "from scratch" as long as they could obtain materials. She told me how months went by as she and her family sat in half refurbished premises and only managed to declare herself settled after seven months.

5.2.1.3 Maria

"One for fish, one for meat, one for vegetables, one for wine"

Maria was European and had been in Cuba for four years, as accompanying her husband on assignment in Cuba. She talked to me about daily life and the difficulty of shopping and how she felt frustrated not knowing where to get things. She explained the difference between the two currencies in Cuba and that shopping outlets were governed by whether it was a shop that sold goods in CUP or CUC, with the former full of rationed goods for Cubans from their official *libreto* (ration book) and the latter full of imported goods for sale in the convertible currency and mainly frequented by foreigners or Cubans with access to CUCs from relatives living overseas or through

employment in tourism or with an international organisation. Because of the scarcity and the need to import goods, she said that everything was expensive and there was little choice of brands or convenience or specialised foods and little logic to supplies. She explained that sometimes, for example, five or six brands of the same product were available and nothing of something else and weeks could go by without basic commodities. Then, when a consignment arrived, everyone was on the phone tipping others off about newly arrived butter or flour or ham. Because of this, she explained, it was necessary to go from shop to shop to find even basic goods. She described how she and her friends spent time trawling the shops until they had exhausted all possibilities and become exasperated by the lack and inconsistency of supply and poor hygiene.

Maria explained that the difficulty of shopping and the lack of basic goods meant that most people turned to the “black market” or illegal vendors, who would call door to door in the neighbourhoods where expats lived, or who were recommended by people she knew. This made daily life more comfortable and easier, but she was conscious of the risks that illegal traders ran, as jail sentences for illegal trading were “over the top”. It was about building up a network of suppliers, “One for fish, one for meat, one for vegetables, one for wine”, she said, in order to settle into a more comfortable way of life. But this, in turn, she said, could also create another source of difficulty, as sojourners had to deal with the daily hassle of what she described as “persistent” and often “opportunist” suppliers, which could cause friction and ill feeling.

Maria described examples of other suppliers, who made their living providing goods and services to expatriates, often at considerable risk or discomfort to themselves. According to her, the local vendors had little choice but to supplement their rations by selling what they had in order to feed their extended families. She gave me an example of a lady who travelled in from outside Havana each week with dozens of eggs on a bus and sold them illegally to one of the sojourners at a rate of one CUC (one US dollar) for ten eggs. She described how she would drop the eggs off with one of the sojourners, who would then pass them on according to individual requirements and collect the money. Maria explained that this kind of networking was common and had been going on for years and that the lady always managed to turn up each week, avoiding detention, because what she was doing was illegal. Another

supplier, Manuel, who brought freshly caught fish, was not so lucky, she said, as he was caught and imprisoned for several years, as fishing was not allowed due to the restrictions on leaving the island. Likewise, she explained, selling potatoes was also illegal, as they were reserved for the armed forces and grown only by official cultivators. Maria knew one of these cultivators, called Manolo, who produced fruit and vegetables for the government, but sold them off to sojourners when they weren't picked up by the officials, as they used to rot away.

Another example Maria gave me was Marilu, who sold wine to lots of sojourners she knew. Maria explained that nobody ever knew how she got hold of it, but, because she lived near the airport and the wine was always from Europe, everybody's guess was that it was being stolen from imports through Customs. Maria said that Marilu was contactable by phone for orders and she would deliver the order personally to the door after being dropped off by car - a small old, shabby, box-like Lada, a "leftover from the Soviet times", she said. She described how she would carry the bottles in a large shopping bag with vegetables to cover the bottles in case she was seen by the police. The normal price, she said, was around 10 CUCs a bottle, though she would give discounts to her regular clients. Another supplier mentioned by Maria was called Pedro, who would deliver legs of pork, which he concealed in a computer bag. Maria described how he would phone his clients to arrange a time for delivery and turn up with the meat wrapped in paper inside the computer bag. This was quite expensive for Maria ("between 40-60 CUCs", she said, equivalent to \$US 40-60), but when it was available, she said, it was an occasion to celebrate and common to set up a lunch with a group of friends. Maria described these large gatherings, where everyone brought something to eat and drink to be shared out and which I often went to myself. They were ideal places to meet other sojourners and share information on where to get supplies informally or what was being sold in the shops at a particular time.

5.2.1.4 Olaf

"No hay problema"

Soon after I arrived in Cuba, I was attending an informal social lunch with other sojourners one day, when an enormous man called Juanma turned up to collect his monthly charge for the television service from the host, a European diplomat called Olaf. Olaf explained that this service was informal, because the Cuban authorities

had banned the import and use of satellite equipment to ensure control over communications, and Juanma's service was a well sought after luxury. He said that, while satellite TV existed in the tourist hotels and could be applied for by foreigners for private use, the channels were very limited and sojourners often turned to private providers for a more varied service as an alternative to the official Cuban state television. However, according to Olaf, it was also an enormously risky service to provide informally and that it was a service for diplomats only, as businessmen could not take the risk of being caught with an illegal satellite installation, because they could be detained by the authorities. I enquired about the service that Juanma was providing by speaking to him directly along with Olaf before he left the house. He told me that he offered the service as satellite dishes became available when people left, as no new dishes were being allowed in. Provision and installation of the hardware was 800 CUC and the monthly fee was 60 CUC to stream news, film and sports channels from "*La Yuma*" (Cuban slang for the United States). He told me that he knew someone who could install the satellite and that he would set the service up himself with a key card, configuring it with his computer and phoning a contact in the United States. Olaf told me that, when the service was interrupted, he could call Juanma to come and re-configure the key card and reconnect the service. "*No hay problema*" ("No problem") said Juanma. Juanma explained that he often had to go abroad to work for several months a year, and that he would turn up when he ask for several months' charges in one go. Olaf said that he would never keep account and expected and trusted his clients to know what they owed and settle up. If they didn't have the cash on them, he would take what he could and just ask them to settle up when he next turned up. Juanma seemed very well off to me, as he owned a car and boasted about how he was going to send his son to study overseas.

5.2.1.5 Ben

"Las mulas"

While obtaining television and satellite services was a challenge for sojourners, it was also difficult to obtain basic electrical goods or spare parts in Havana, as there were only official, state run shops with very little choice and high prices . One sojourner, Ben, from a European country, described to me how he had tried to buy a television in one of the shops, but was taken round the back of the shop by the salesman and offered a more recent model not on sale in the shop, although it was more expensive. Ben explained the system of "*mulas*" ("mules" or smugglers) to me. They were

Cubans who lived abroad, or had permission to travel, and who brought in quantities of consumer goods, claiming that they were for personal consumption. He explained that importing the goods was legal, if the goods were for personal use, but the tax on imports was 100%, which had to be paid in cash to Customs at the airport. While it was not legal to then sell the goods on informally, Ben explained, it was common and the goods were expensive. Ben also talked about how spare parts for cars could also be obtained in this way, though he said it was difficult to come by exact models on the island. If a certain part could not be obtained informally, he explained to me, it had to be imported through an embassy, or brought in by someone who was going on a trip, and this could take several months. Ben described how he had a colleague who had this problem and was frustrated because she could not use her car for several months. He told me that it was best to bring in small spare parts when travelling back from a trip abroad, such as fan belts, air filters and windscreen wipers for replacement during the year. He also described the “garage sales”, which Ben said that these were popular amongst longer term residents, because they could not import goods themselves, and Cubans, because of the shortages and restrictions on the island, but that everything was sold at high prices and were not good value for money.

5.2.1.6 Analysis: Living with scarcity

The reasons for scarcity in Cuba are described in Chapter 2: Research Context and broadly relate to the political and economic situation of the island and the experiences of sojourners described in the cases above give an idea of the challenges that they faced in Havana because of this scarcity. Providing for a family and trying to create a normal home environment in what were, for most sojourners, fairly unusual and difficult conditions while on international assignment over a period of time, were consistently cited by sojourners as a major challenge. In order to understand more deeply the effect that these challenges had on sojourners, they are presented and explained in table 5.1 below and then further discussed in the commentary section that immediately follows.

	Challenge	Effect	Analysis
A	<u>Naomi</u> and <u>Maria</u> describe the difficulty of setting up home and shopping in an	·Discomfort ·Frustration	Shopping for a range of consistently available basic, branded goods might be taken for

	<p>unfamiliar environment, including:</p> <ul style="list-style-type: none"> ·There is a lack of essential goods ·There is little brand choice ·Supply is inconsistent ·Basic goods are expensive ·There is a shortage of building materials for repairs 	<p>and low morale</p> <ul style="list-style-type: none"> ·Sojourners become exasperated and critical of Cuba 	<p>granted by someone from a developed economy, but the particular political and economic context of Cuba complicates this (see 2.4). The difficulty of access to goods can affect people's state of mind and possibly hinder psychological adjustment (Ward et al, 2001). Also creating a comfortable home for a family might ease anxiety and help all family members adapt more quickly. Being denied good living conditions while trying to carry out a normal routine is stressful for all and can cause crossover and spillover stress amongst family members and domains (Haslberger and Brewster, 2008). This is referred to in 3.3.6.4</p>
B	<p>Diplomats can order new furniture and electrical goods through with special permission from the Cuban government,</p>	<ul style="list-style-type: none"> ·Diplomats have advantages that non-diplomats do not have ·Risk of arrest of non-diplomats 	<p>, The situation of diplomats and non-diplomats appears unequal, as diplomats can order tax free goods from overseas, while non-diplomats cannot. Non-diplomats import and have to rely on informal networks to obtain second-hand goods, which is essentially breaking the law without immunity.</p>
C	<p>Naomi described other ways of getting furniture</p> <ul style="list-style-type: none"> ·Hand me downs ·Garage sales ·Bought second hand goods from Cubans ·Used local craftsmen 	<ul style="list-style-type: none"> ·Engaged with environment ·Sought solutions positively 	<p>Naomi demonstrates considerable resourcefulness in overcoming obstacles created by chronic shortage. The ease with which she related to and communicated with local tradespeople contributed to the</p>

			adjustment of her family over an extended period of seven months. Her language ability, experience and determination were perhaps key factors in helping her settle and these are discussed in 5.3. Sojourners are stimulated to seek local solutions to shortages, which increases contact with locals and helps them adjust socioculturally (Ward et al, 2001).
D	Expatriates tip each other off and pass each other the names and phone numbers of suppliers all the time	<ul style="list-style-type: none"> ·Networks created ·Ensures access to basic goods and better quality of life 	Networking appears to be a major underpinning of sojourner life (Granovetter, 1973), which can improve the material quality of life greatly and can increase psychological adjustment. Sojourners that find themselves confronted by similar problems collaborate to help each other out, which seems to mitigate the difficulties in a closer way than for those with comparable domestic assignments (Harvey 1985; Lauring and Selmer, 2009).
E	Expatriates turn to the “black market” or illegal vendors	<ul style="list-style-type: none"> ·Sojourners create a network of informal vendors, which makes daily life more comfortable 	Having foodstuffs delivered to the door appears to mitigate the frustration of shopping mentioned by Maria above and so may contribute to adjustment. Through this sojourners could have sociocultural contact with locals and describe how built social ties and networks amongst themselves, thus enriching their experience and improving their

			access to solutions (Granovetter, 1973).
F	Suppliers run risks while trying to improve their quality of life	· Widespread illegality and risk of punishment	(Botín, 2009) describes how Cubans pilfer from state companies and sell what they can through the informal economy in order to access the convertible currency (CUC) for a better quality of life. Punishment for locals who are caught can be harsh, unless they have a special connection like Juanma above.
G	Dealing with vendors is hassle and causes friction	· Unequal and superficial relationships develop between sojourners and locals and could lead to exploitation and opportunism	The relationship between sojourners and locals can also become opportunistic and transactional, due to unequal means. From the sojourner point of view, buying through the informal economy could be an alien way of doing things, as it is acting illegally, which could hinder adjustment.
H	<u>Olaf</u> explains <u>Juanma's</u> situation: Some locals seemed to be protected and well off	· Inequality in local life	Installing satellite equipment seems high risk, as it is illegal and frequent foreign travel and access to foreign currency appears unusual (see 2.4.5), so Juanma would need to have good connections to be able to operate in this way. This is in contrast with individuals selling small quantities of stolen goods for a few extra CUC and an indication of inequality.
I	<u>Ben</u>	· Importing goods legally creates delays	Some Cubans seem to have more freedom and are more protected than others, while

	It is also difficult to obtain basic electrical goods or spare parts in Havana	<ul style="list-style-type: none"> ·Mules bring in goods to be sold informally at high prices ·Garage sales of scarce items 	some can travel freely and others not and some can access CUCs and others not. Informal systems tend to bypass official channels in order to gain access to CUCs and improve life for locals and sojourners, but can weaken reform (see 2.4.8). The informal economy appears to increase the cost of living for sojourners and involve them in illegality, which can put them or locals at risk and can affect morale.
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Table 5.1 Analysis of living with scarcity

5.2.1.7 Comments on living with scarcity

The accounts in this section show how the scarcity of basic goods and materials are reported to have a profound effect on daily life in Havana, both for the local population and sojourners. In the accounts of sojourners, they describe specific stressors (Haslberger and Brewster, 2008) that are significant to them in the in the adjustment process, which can be linked to the specific context of Cuba. Most of the examples given were within the “non-work domain”, identified by Shaffer & Harrison (1998). For example, housing in Havana was in short supply and little building or repair work took place due to shortage of appropriate materials due to the economic problems described in 2.4.4. However, the stressors described by Maria, for example, in relation to sociocultural contact within the informal economy also highlighted “social interaction” adjustment, considered important by Black et al (1991). Fuelled by the operation of a dual currency economy, shortages tend to give rise to informal solutions, which appear to embed inequality and illegality in the social experience of everyday life. For sojourners, this situation can seem alien and illegal and can create unease at living in this way, which may not tally with prior expectations of life in Cuba. This could affect morale and make it difficult to adjust to the new environment, as indicated in row A, although diplomats reportedly have some advantages in accessing supplies, while non-diplomat sojourners tend to have to rely entirely on local networks and may risk prosecution (row B). Engaging with the local population in order to find supplies and seek alternative solutions has the

advantage of creating sociocultural contact for sojourners with the local context, particularly for those that speak Spanish (row C), while collaborating with other sojourners can lead to the creation of supportive networks and psychological comfort (row D) (Ward et al, 2001). Delays, shortages and the expense of normally readily available commodities in most developed countries can sap morale amongst sojourners and could lead them to develop negative attitudes to daily life. In this sense there may be a mismatch between their expectations of quality of life and their experience.

For the local population scarcity appears to be even more acute, as described in 2.4, especially for those that lacked access to foreign currency or the local dollar-pegged CUC. As a result, the sojourner population can appear to represent an opportunity to sell goods through the informal economy for access to currency and a better quality of life, although this is done illegally and is risky for them personally (rows E and F). This can also create some tension in the sociocultural contact between sojourners and the local population, which can become transactional and opportunistic or exploitative (row G). While the informal economy appears to be widespread and part of everyday life, some Cubans seemed to have greater access to prohibited goods and services and could mingle with sojourners without fear of prosecution, possibly as a result of connections with authority, although how this works is difficult to identify. Others sell limited items sporadically and seem to be at considerable risk of being caught, which can create inequality (row H). Likewise, corruption appears to be common amongst employees in a position to divert imported goods and benefit from pilfering, illegal selling and corruption seemed to have become a way of life (row I), as described in 2.4.

In summary, in seeking to explain the experiences of sojourners while living with scarcity, it becomes evident that there are underlying structures, systems and cultural resources that impinge upon any a particular context and which influence daily life (Holliday 2011, p. 131). In this sense, as described in Chapter 2, we can use sociological imagination to make the connection between “personal milieu” and “social structure” (Mills 1959, p. 6), in that the Cuban political and economic situation is seen to have an impact on production and imports leading to an acute shortage of all sorts of goods, which affects the quality of life and morale, as described by Naomi, Maria and Ben. They also describe the social consequences of this in the way people

engage with the problems. It could be argued that the inconsistency of supply has fed a vibrant informal economy, which leads sojourners to collaborate more closely with each other and help each other in daily life, both through necessity and through a sense of community, or motivates them to interact with their local environment, which can enhance psychological and sociocultural adjustment (Ward et al, 2001). The dual currency and economy can also create inequality amongst Cubans between those with access to CUC or political influence and those without, as described by Olaf. Illegality and corrupt practices seem to have become embedded in daily life, being tolerated by the authorities at times and severely punished at other times, creating a sense of uncertainty and vulnerability amongst business sojourners and Cubans who do not have political connections. At the same time, as sojourners generally have more means than the local population and access to different supply systems, resources and benefits, as described by Naomi and Maria, there is the potential for antagonism between locals and sojourner groups through opportunism and exploitation. As we have seen, when examining the context of Cuba in Chapter 2, the underlying political causes of this situation are open to debate and subject to ideology, whether caused by the US embargo or by the Cuban government's desire to preserve the political status quo, but there is little doubt that it has at least an indirect influence on sojourner adjustment. Discussion of this analysis and its relation to adjustment are returned to in the final chapter.

5.2.2 Living with control and surveillance

5.2.2.1 Introduction

We have seen in 2.2.5 how social control and daily surveillance is a part of everyday life in Cuba, both for the local population and international sojourners. The following cases bring out some of the issues and challenges of dealing with this level of social control for sojourners. Important factors are the different status of diplomats, non-diplomats and local Cubans, and the different challenges they had to face as a consequence.

5.2.2.2 Carol

“Everyone has to be careful with what they say”

Carol had been in Cuba for ten years with her husband and four children. She described how her husband worked for an international company and was not a diplomat, which, according to her, meant that she had to be careful about what she

said and who she socialised with. She told me that she had to avoid contact with any events in the US embassy, for example, and could not get satellite internet or television through informal channels. Because of this, she said, her family had to make do with the official internet, which was a slow dial-up service, set up as a protected country intranet which was constantly monitored. She also told me that all telephones were monitored, too, and that people could hear clicks and the sound of breathing in the background during calls. She jokingly mentioned an anecdote of how she complained by phone about the internet service not working and was told that there was “a back log in reading emails!” Carol also told me that she found the lack of availability of international newspapers, books and magazines from overseas difficult to get used to, and that the mail and courier services were unreliable, as orders could be intercepted by the authorities or stolen by employees. This meant, she said that she did not know what was going on around the world and she said that this frustrated her because she was interested in current affairs.

Carol explained to me that one of the most frequent topics of conversation amongst sojourners was the level of surveillance and control that pervaded everyday life. For her, there seemed to be a need for the authorities to monitor everything that expatriates did and foreign residents were carefully corralled into certain areas of the city and their movements and communications monitored closely. “Everyone has to be careful with what they say”, she said, because saying the wrong thing, she added, could lead to problems with the authorities. She gave me a number of examples of seemingly pointless bureaucracy and control in daily life and said that many sojourners also commented on the constant hassle factor of dealing with authorities, which affected both their working life and private life. She described incidents of friends of hers being followed by plain clothed individuals, having their number plate jotted down when parking near another friend’s house, and the long identity and customs checks foreign residents had to endure at airports, where their possessions were sometimes confiscated because they were “illegal”. She explained that these were either usually small electrical goods, such as kettles or toasters, as they were banned because of power restrictions in Cuba due to the lack of oil, but also foodstuffs, which, she said, would end up in the hands of the Customs officials. She also told me that she and her family needed permission to exit the country that she and her husband were always questioned by their bank when they were withdrawing money from their account, being asked what the money was for and why so much.

She explained to me that there was a limit to what they could withdraw, due to currency restrictions, and that they always had to justify what they needed it for.

5.2.2.3 Pepe

“Es tolerado, pero no es legal”

Another example of how vulnerable non-diplomatic sojourners' position could be was described to me by Pepe, a businessman originally from Spain, who related to me an incident that occurred to him when he was driving home from a day out with his family. He described how they were stopped by police, who had information on his car (via the number plate) and said that it was to be *intervenido* (confiscated), but he said that no explanation was given to him at that point other than it was an order for the police to carry out. He said that he could not contest the decision and he related how he was left on the side of the road stranded with his family. He told me that he later discovered that the institution he was working for had been targeted because of an accident caused by one of its employees and the order for all employees' cars to be confiscated had been given. He said he was one of the lucky ones because he had some contacts and persisted in trying to get his car back and eventually succeeded several months later. Pepe pointed out to me, “the rules are not always clear” and, according to him, it was a question of judging whether something might be *tolerado* (“tolerated” or “allowed”), even if it was not totally legal. *“Es tolerado, pero no es legal”* (“It’s allowed, but not legal”).

5.2.2.4 Miguel

“Everything and everyone is controlled in Cuba”

Cubans were also closely monitored, although there was definitely a tendency to give more freedom to some artists and some academics, as they could travel and had social contact with sojourners. However, this was challenged by one Cuban contact, Miguel, who said to me, *“Todo y todo el mundo es controlado en Cuba”* (“Everything and everyone is controlled in Cuba”), explaining that every artist or writer was attached to an Institute or a Ministry and that, *“Sabén lo que hacemos y te pueden abrir or cerrar una puerta”* (“They know what we do and they can open doors for us or close them.”). This seemed to him both a good thing and a bad thing. On the one hand, he thought that it was good that *“nadie pasa hambre”* (“no one goes hungry”) and that, *“Todo el mundo tiene educación y salud”* (“Everyone has free Education and Health”). This, he told me, was “ideology” and control was needed to make sure

everything was “fair”, but he admitted that some just wanted to keep power at any cost, which was “political”. He said that it was not good that people needed permission to travel or that they earned so little that they had no choice in what they bought or had to buy things “*por lo negro*” (on the black market).

5.2.2.5 Diplomats

“La franquicia”

Diplomats, however, experienced a different type of control, because of their official function and the fact that they represented foreign governments close surveillance in all respects, particularly at the beginning of their stay, and many comments were made from newly arrived diplomats on a range of aspects, including being followed, having their phones tapped, their emails checked and their movements recorded. US diplomats, in particular, were under heavy surveillance and had their movements restricted to the capital city only. Even basic daily activities could attract an approach by the police, particularly if it involved someone moving outside their normal area of activity. One recently arrived diplomat, Luigi, told me, for example, how he had got lost in his car at the beginning of his stay and was followed and stopped by police when he took a wrong turning near a military area. He said that they had recognised the diplomatic plate and had followed him. He also told me that whenever he travelled to another city he needed permission and that he was met by an official, who “minded” him throughout the visit. He also described the way all the highways were monitored and that he had to pass through checkpoints where his number plate was checked.

Another sojourner, Mario, on secondment with a European embassy as a security specialist, related to me how he had gone for a jog in the back streets near where he lived and was stopped by the police and questioned, before being asked to go back to his neighbourhood and followed. The next day, he recalled, he received a summons by the authorities to be questioned about his activities. According to Mario, diplomats from the US and the EU were seen as representatives of hostile governments by the Cuban authorities, because of their international criticism of the level of human rights within Cuba, and heavy monitoring seemed to be aimed reinforcing the idea of authority. In my view, it was possible that it was made fairly obvious that surveillance was being carried out, so that we were all aware of it and,

for most of us, this led to nothing, except for those who might be active in making a stand against the authorities by visiting protest rallies or dissidents.

It was common for people to tell me of minor hassles and inconveniences they experienced, such as being manhandled during rallies or delayed when passing through the airport. Albert, for example, a diplomat from an EU country, told me about how he had tried to purchase a television locally, but was not convinced about what was on offer. As diplomats were allowed to import goods free of charge, he said that he decided, on the spur of the moment, to buy a flat screen television at Panama airport. This was common for many travelling to Havana and legal, as described above in 5.2.1.5 by Ben, and airlines facilitated safe storage in the hold at no extra cost. As described above, the baggage conveyor belt at Havana airport for short haul flights from nearby countries, such as Panama or Mexico, was always a long procession of televisions and DVD players and such, which could be brought in by Cubans and non-residents, but which were fully taxed at 100% of value on arrival. Diplomats, however, could import these goods free of charge, although they needed to provide a *franquicia* (permit) through their embassy and the Ministry, before purchasing the item and transporting it. Albert said that he was hoping that he would not be stopped by the *Aduana* (Customs) and allowed to enter with his television because of his rights as a diplomat. However, he told me that, as he had not obtained his permit beforehand he was told that he would have to pay the tax or go and request the permit while the television was held in Customs. This he did and it took ten days to get the permit. He returned and picked up the television and brought it in free of charge, but the whole process seemed a bit pointless to him, he said, if he could prove that he had diplomatic status in the first place. He said he was convinced it was because he was being targeted by the authorities because of his connection with dissidents and presence at protest rallies, such as “*Las Damas en Blanco*” (“Ladies in White”), a protest movement by the spouses of jailed dissidents who went in procession through the streets dressed in white as a symbol of silent and peaceful protest. It was common for these procession to attract international observers from embassies and they could sometimes result in physical confrontation.

5.2.2.6 Analysis: Living with control and surveillance

These accounts outline the challenges of living and doing business in Cuba as a foreign resident and describe the daily sense of control within a tangibly bureaucratic

and politicised context. For business sojourners and their families, there was a notable feeling of vulnerability in the face of possible prosecution, while diplomats had their movements restricted or monitored in order to ensure limited contact with those classified as “dissidents” by the authorities. These challenges are broken down and analysed in the table below and discussed in the commentary section that follows.

	Challenge	Effect	Analysis
A	<p><u>Carol</u></p> <p>Not diplomatic, so has to be careful who she socialises with, constantly monitored, no privileges</p> <p>·Has to avoid contact with Americans</p>	<ul style="list-style-type: none"> ·Potential risk of detainment or expulsion ·Restriction of movement outside Cuba ·Sense of isolation and vulnerability ·Not allowed diplomatic privileges (e.g. importing goods) 	<p>Non-diplomatic sojourners do not have immunity and had to negotiate the local illegal informal economy carefully on pain of punishment. The general economic situation was fragile and Cuba depends on foreign trade to survive, which meant it is under scrutiny. Their communications were monitored and they were not allowed satellite connection. Their passports were withheld and they needed an exit visa to leave Cuba. Most tended to avoid contact with US diplomats, possibly to avoid attention from the authorities. In a context of limited legal recourse, business sojourners and their families were quite vulnerable and possibly needed to be more cautious than diplomats, as the possibility of serious consequences was ever present. They could not always</p>

			<p>speak freely and were careful who they talked to, being aware of the possibility of sanction and even arrest and imprisonment, as had happened on a number of occasions while I lived there. Their adjustment to Cuba appeared to be different to diplomats, as they could not import goods, but they had extensive networks in the informal economy due to lengthy residence</p>
B	<p>Access to media and communications limited</p> <ul style="list-style-type: none"> ·Official internet is highly restricted, slow (dial up) and monitored ·No access to informal internet or satellite TV ·No international publications or press available 	<ul style="list-style-type: none"> ·Contact with outside world limited ·Information and reports all from one official source 	<p>Access to information is limited in Cuba and this conserve the government's ability to control perceptions of life in Cuba and possibly create a sense of isolation amongst sojourners, which can affect their adjustment and desire to continue in Cuba.</p>
C	<p>High level of surveillance and control</p> <ul style="list-style-type: none"> ·Being watched ·Being listened to (phone) ·Being monitored (emails read) 	<ul style="list-style-type: none"> ·Invasion of personal space ·Sense of vulnerability and fear 	<p>Monitoring and control seemed to be very much in evidence and a part of sojourner life. For non-diplomats the threat of arrest or expulsion seemed very real and was on the increase, possibly to try and transfer business interests to</p>

	<ul style="list-style-type: none"> ·Hassle at Customs and at the bank ·Car number plates monitored 		<p>more friendly states, such as Venezuela, China and Brazil</p> <p>Most sojourners would prefer to change the subject, rather than give an explanation to direct questions. They were possibly mindful of how they were monitored.</p>
D	<p><u>Pepe</u></p> <p>Cuba a difficult place to do business as rules are not clear</p> <ul style="list-style-type: none"> ·Dealing with unpredictable authorities ·Having to employ people illegally ·Not having any legal recourse 	<ul style="list-style-type: none"> ·High level of risk in doing business ·Vulnerable to expulsion or arrest ·High degree of politicisation in daily life 	<p>The lack of segregation of powers in Cuban government means that all decision-making could be described as highly politicised and often invested in a particular individual, which could lead to delay or unpredictability. This could create uncertainty about what is legal and tolerated, which could change from day to day and lead to arrest, expulsion or confiscation with limited legal recourse. i. Living with illegality can create anxiety and a sense of vulnerability, although the rewards of doing business can be substantial, due to the difficulty of market entrance.</p>
E	<p><u>Miguel</u></p> <p>Cubans are monitored and artists and academics are given more freedom (Miguel)</p> <ul style="list-style-type: none"> ·Artists travel fairly freely and do 	<ul style="list-style-type: none"> ·"Everyone is controlled in Cuba" ·Inequality of status 	<p>Control of media and restrictions on travel can create isolation and influence perceptions on the current situation in Cuba amongst its population. Certain groups in society seemed to be favoured and are allowed more freedom,</p>

	<p>business for personal gain</p> <ul style="list-style-type: none"> ·Academics access internet 		<p>presumably as long as they comply.</p>
F	<p><u>Diplomats</u> closely monitored (Luigi, Mario)</p> <ul style="list-style-type: none"> ·Phone and email taps ·Restricted movement in Cuba (especially US) ·Minders on official trips ·No arrests, but can be “hassled” (Albert) 	<ul style="list-style-type: none"> ·Invasion of personal space ·Reduced engagement with local population ·Possible negative attitudes to local environment 	<p>Diplomats’ movements are closely monitored by the authorities possibly because of their official status and in order to avoid contact and publicity around the political objectors to the regime, known as <i>disidentes</i> (dissidents). Official visitors have to be granted official visas in advance and are met by officials from the Ministry in addition to any local academic contact. All highway traffic is monitored in Cuba and cars are stopped at regular check points while number plates are checked on a computer. All cars are categorised in Cuba by different colour number plates and codes and the owner of the vehicle can be checked easily. Diplomats have black plates, non-diplomat residents orange, tourist hire cars red and each ministry has a different colour.</p>

Table 5.2 Analysis of living with control and surveillance

5.2.2.7 Comments on living with control and surveillance

These accounts suggest a framework of close surveillance and social control of foreigners and the local population in Cuba. This is evidenced possibly more in the work domain (Black et al, 1991), but has spillover effects to the non-work domain in that it can affect family life and crossover effects, for example, in the case of Carol, for other family members (Haselberger and Brewster, 2008). This control seemed to be different for different groups, whether diplomats, the foreign business community or local Cubans, as indicated in rows A, C, D and F. For example, diplomats seemed more heavily monitored and restricted in their movements within Cuba, while business sojourners experienced restrictions on what goods and services they could access. Their travel outside Cuba was also controlled, as they needed an exit permit and could have their passports withheld. Business sojourners seemed to lack clarity about employment law and feared acting illegally as a result, meaning that they were possibly more vulnerable to arrest, expulsion and confiscation due to limited access to legal recourse. It is not clear how deliberate this lack of clarity was by the authorities, but it could also be a consequence of how difficult it must be to control every aspect and of everyday life centrally and the resulting uncertainty amongst officials about whether they were empowered to decide things. Communications were also restricted, as described in 2.4.6 and, as described in row B by Carol, contributing to insulation from the outside world, while state controlled media could influence perspectives on current affairs and monitoring and control could promote segregation of foreign residents. In this sense, it could be said that sojourners were influenced by the local political and social order to an unusual degree and were subject to the inconsistencies of a highly politicised situation and institutionally alienated and powerless. This could create anxiety, though some business sojourners continued to live under these circumstances, possibly because business in such restricted conditions could be profitable and local life generally enjoyable.

Monitoring, control and surveillance, then, seemed to be a regular part of life in Havana, both for sojourners and locals, but, while contact between Cubans and sojourners appeared to be frequent and fluid, it might be that it was conditioned by a perceived need on the part of the authorities to manage contact with and create distance between visitors to the island and local people, as indicated by examples of segregation (Berry, 2005). This, together with the very limited and controlled internet access, the absence of international press, magazines or books and the availability of

only official Cuban media channels of television, radio and press, could create a heightened sense of isolation from the rest of the world, including from close family and friends overseas. Despite these experiences, Carol and others related their anecdotes and views with a sense of irony or good humour, possibly as a way to deal with anxiety, but the pervasive sense and psychology of feeling watched and restricted, together with everyday sights of overt checking of cars and identity documentation and the real, unspoken potential for possible sanction or even imprisonment became an evident part of everyday life.

The possible underlying causes for this level of social control are explored in Chapter 2 and possibly relate to the way the Cuban government seeks to protect the revolution, which it perceives as being under threat both from within Cuba, in the form of social protests and corruption, and from the outside in the form of hostility from the United States. In this sense, we can again use sociological imagination to make the connection between “personal milieu” and “social structure” (Mills 1959, p. 6), in that the Cuban socio-political context can be seen to have an influence on sojourner adjustment in what can be described as a politically sensitive environment. This is looked at more closely in Chapter 6 when discussing the proposed model for culture shock.

5.2.3 Living with inequality

5.2.3.1 Introduction

While the accounts in the previous section explore the impact of social control and surveillance on sojourners in Havana, this section looks more at the consequences for Cubans and contextualises sojourner challenges within the local sociocultural environment. The differences in the conditions of life between sojourners and local Cubans seemed to create tensions and inequalities in a difficult economic situation and a context of social segregation (Berry, 2005).

5.2.3.2 Kim

“Sacrificio y paciencia”

Kim was the spouse of a European diplomat, had already lived in Latin America and spoke fluent Spanish. She told me that she was fascinated by the local characters that she met and how she liked to talk to them to get their point of view on life in Cuba and even the government. She described how she had inherited three

custodios (guards), a gardener and a housekeeper on arrival at her designated villa in Havana, all of whom had been there through several appointees to her husband's post and had got to know all the families. She explained that employing domestic staff was common for sojourners in Cuba to help with maintaining the often dilapidated properties and garden and running errands or fixing things that broke down.

She described each of the staff and how they were surprisingly open in their criticism, given the potential for sanction. She described how her gardener, for example, who she said had been "with Fidel in the revolution", was in his late seventies and *decepcionado* (disappointed or disillusioned) with the current regime, because it had "lost its principles" since "*El Período Especial*" ("The Special Period"), which was an extended period of economic crisis in the 1990s, triggered by the collapse of the Soviet Union, described in 2.2.4. She also described one of her *custodios* (guards), Fred, who told her that the revolution was no longer "*viva*" ("alive"), because a minority dominated and lived a privileged lifestyle. She also told me how he had also described to her the rhetoric of the government towards the people, calling for "*sacrificio y paciencia*" ("sacrifice and patience") for the sake of the revolution. He said that it was time for the leaders to show some sacrifice themselves and that everyone was "*harto*" ("fed up") with "*desigualdad*" ("inequality").

Kim also described another of her *custodios*, Beni, saying that he was an ex translator with the regime and how he described this period in detail to her, with examples of how they would get by, eating banana skins or using orange peel to make soap. She related to me how, as a result, he had developed a habit of never throwing anything away and of storing all sorts of containers from the rubbish in the garage "*por si acaso*" ("just in case"). She also described how he came to work on his bicycle, which he called "*el caballo de la revolución*" ("the stallion of the revolution"), because it became the main means of transport during the Special Period when Cuba did not have foreign currency to import oil. She said that Beni was always willing to go off on his bicycle to search for vegetables at the *agromercado* (vegetable market) and he would ride off with a huge *machete* tucked inside his shirt, because he was fearful of having his bicycle stolen from him. Kim described how he posed as a "self-appointed head guard", which the other staff made fun of, and she had wondered why a translator had ended up in such a humble position. When I asked

her why she thought this was the case, her explanation was that domestic staff were privileged and given work in houses to keep an eye on foreign diplomats and report back to the authorities. According to Kim domestic staff could be paid 160 CUC a month (\$US 160), which was up to twenty times the average wage of a university professor or a hospital doctor, and which gave them access to the informal economy, unlike many of their compatriots. She explained that her *custodios* all had many dependents and that they were the only breadwinner for in their extended family.

Kim related the case of her home help, Phyllis, who, she explained, had failed to turn up for work one day. Later that morning, Phyllis phoned the office where Kim's husband worked to explain that she had been stopped by a policeman on her way to work. Kim related that Phyllis had told the policeman that she worked for *extranjeros* (foreigners) when she was questioned about where she was going. Most of the domestic work done for foreign residents, Kim explained, was arranged "unofficially" and that it was better that they did not mention this when questioned. Phyllis was arrested and told to never go back to the house, but released that same day. Kim later learned that her husband was a *militar* (in the armed forces) and, as such, had to set an example, otherwise, as Beni pointed out to her, it may have been "*tolerado*" ("allowed"). Kim explained that all of the staff lived in constant fear of being caught and stopped from working, although, she pointed out, there was no other alternative system to obtain home help.

5.2.3.3 Amy

"The drama of everyday life!"

Amy was a long term sojourner from Europe, who spoke to me about the difficulties of everyday life in Cuba, describing it as a drama playing out before her eyes. "The drama of everyday life", she called it, where everything was uncertain and people lived on tenterhooks, trying to cope with constant inconvenience, such as power and water shortages, with cuts every day in some *barrios* (residential districts), or torrential rain that would flood the streets, bringing life to a standstill. At work, she said, the servers would go down several times a day and the air conditioning regularly broke down and sometimes needed an essential part that was not available in Cuba. She described how the shops suddenly had no bread, or butter, or milk and suddenly it arrived and there was plenty and then none again in a few days. This was not occasional, she explained, it was daily and it eroded confidence in anything

sustainable or enduring. I asked her what the reasons for this were. On the one hand, she said, Cuba had a harsh, tropical, humid climate which affected machinery and destroyed roads and buildings. Also, in her view, the way the economy was run did not allow for individual initiative as everything was controlled by the government. For her, Cubans had developed a longstanding habit of just putting up with poor conditions and were passive. She said that they complained a lot, openly bearing their heart about their suffering, their low wages, the lack of food, ineffective government and so on, but would not take action for fear of reprisal. Another aspect, she said, was the political need for drama and pending disaster. In her view it was a justification for a constant sense of emergency and the need for control, “in case *El Imperio* (“The Empire” – the United States) invaded”. She told me about how children received instructions and drills in state schools about what to do in case of invasion by the United States, for example, and how the newspapers played up the role of victim, in her view, making big news of quite insignificant events and often attributing every small achievement as an example of the success of the revolution.

However, Amy explained that her view was that it was the local Cubans who were most vulnerable to everyday life and this is what she found hard to get used to. According to her, while expatriates could eventually live in decent housing in the Miramar residential district, after a struggle to set it up on arrival, often with air conditioning and stand-alone generators to offset the discomfort of the constant power and water cuts, the more outlying areas of Havana maybe only had electricity and water for a couple of hours a day or even every other day. Expatriates could also access extra supplies and goods, she explained, while Cubans had to make do with basic rations or try and take advantage of opportunities to earn CUCs, although foreigners were also charged more for basic services such as electricity, water and phones. She also pointed out that some of the largest villas in the Miramar residential district were occupied by Cuban officials, such as one minister next door to her, enjoying the same privileges as expatriates.

5.2.3.4 Simona

“Siempre hay uno del partido”

While I was travelling to an external meeting one day, I met a Cuban lady at the airport, called Simona. She told me that she worked for an embassy and was allowed an official visa to take trips on overseas business, though, she explained, she could

not travel with her children so that “she was sure to come back”. She told me that she had to be careful about drawing attention to the extra wages that she earned in the convertible currency (CUC). I was aware that, while it was illegal for Cubans to earn in CUC, many locals accessed the currency through “unofficial” earnings with international organisations, tips from tourists or through the informal economy. In my view, use of the two currencies effectively created a two tier society, as CUCs were required to buy most things other than locally grown agricultural goods, and fed a growing black market of goods and services. Simona told me that she would never take a taxi to her house, but got out round the corner and walked to her front door so as not to draw attention to her extra earning power, or would discretely smuggle in extra food or shopping for fear of being challenged and “*delatada*” (“denounced”) by her neighbours to the local *comité* (local “neighbourhood watch” groups). Simona also described that at work everyone was aware that certain individuals were placed in embassies from the Communist Party. “*Siempre hay uno del partido*” (“There’s always one from the Party”), she said, whose job it was to keep an eye out and report back, although, she claimed, everyone usually knew who it was and took care with them. What struck me about this account was that there seemed to be “insiders” and “outsiders” in Cuban society in terms of whether someone was aligned with or serving the official political structures, or whether they lived their lives outside them. In Simona’s case, to be able to work in an embassy she would have to be approved by the authorities, so she was to a large extent part of the system, although she had created a life that gave her a certain amount of freedom from it and, therefore, felt free to distance herself from it and even criticise the authorities.

5.2.3.5 Manuel

“Relationships are everything in Cuba”

A locally based Latin American businessman called Manuel, who had been working in business for a number of years in Cuba, also mentioned the workplace and described to me the kind of pressure Cuban personnel worked under. According to him, people worked in fear of losing their job and gave the example of “one good manager” who had done a deal with a foreign company, but the company had gone bankrupt. The manager was sacked for incompetence, which he thought was not right, as it was not his fault. He explained to me that the man was now without a job and had had his passport taken away from him so that he could not travel. His family found him a good job in another country, he explained, but they told him that the

authorities would not give him an exit visa “*por desgracia*” (because he was in disgrace). Manuel gave me another example of a time when he took some holiday guests to pick up a rented car. He described how the customer services assistant warned that tourists must absolutely bring back the copies of the documents he was handing to them, as the police came to reconcile their records against the papers. Manuel told me that the assistant said that if they did not do that, he would lose his job. Manuel’s view was that local people worked well, but lived in fear of something bad or dramatic happening to them. He said that he knew of other people who had been able to keep their job through the contacts that they had. He said that it was about who you knew. “Relationships are everything” in Cuba, he said, explaining that because wages were so low, people got what they needed through people who could gain access to the right channels and that local people were always on the lookout for people who could help them achieve a better quality of life.

5.2.3.6 Juanito

“El turismo nos da vida, pero nos mata, también”

The inequality of relationships was possibly at its most heightened in the tourist industry, where more and more Cubans worked in order to access a better quality of life, either legitimately through employment in hotels and dedicated services or informally in ways described in 2.4.5. While life in Havana for sojourners was essentially on the margins of the tourist areas, I could see that there were glimpses of the effect of tourism on local life. Just outside the centre of Havana, for example in the Miramar residential area mentioned above, there is the old country club of Havana with pools, restaurants and tennis courts, which dates from before the revolution. Juanito, a local Cuban who worked at the club explained to me that, for a long time, Cubans were not allowed to enter the club, as it was reserved for foreigners. He told me how a lot of foreigners, mainly from Canada and Europe, came in the winter weeks and months to get to know “*chicas*” (“girls”), spending time at the country club in Havana and in the tourist areas of Varadero, a tourist resort outside Havana, and other parts of Cuba, in specially built accommodation for tourists. According to Juanito, tourism was a good thing and allowed Cubans to earn money, although, he said, it created “*desigualdad*” (“inequality”). “*El turismo nos da vida, pero nos mata también*” (“Tourism gives us a living, but kills us, too”), he said, possibly thinking of the division and inequality that the dual economy had introduced into Cuban society.

5.2.3.7 Analysis: Living with inequality

These accounts paint a vivid description of aspects of life in Cuba for Cubans, which gives insight into the daily struggle to survive and the challenges of dealing with inequality, which can give rise to situations of disadvantage and exploitation. This complements Maria’s account above, which describes the problems of the informal economy and the challenges of opportunism in the interface between sojourners and the local population in the context of tight social control. From the point of view of sociological imagination, these types of challenges could be described as unusual in international relocations and peculiar to the distinct nature of a highly politicised society. The challenges are broken down and analysed in the table below and discussed in the commentary section that follows.

	Challenge	Effect	Analysis
A	<u>Kim</u> Communicating with locals	<ul style="list-style-type: none"> ·Understand context ·Faster adjustment 	Kim’s previous experience and language ability enabled her to deal with some challenging problems (diplomatic status, too), and meant that she was possibly more likely to adjust both psychologically and socioculturally more quickly (Ward and Kennedy, 1999)
B	She moved into her designated villa, which was in poor condition	<ul style="list-style-type: none"> ·Settle family more quickly ·Established domestic staff 	Diplomats have accommodation assigned to them, which is then passed on to successors. On the face of it, this is an advantage, but maintenance is the responsibility of the tenant and is not always kept up resulting in the need for

			major refurbishment, described in 2.4.5
C	Having domestic staff was common for sojourners in Cuba	<ul style="list-style-type: none"> -Easier lifestyle -Contact with Cubans -Inequality -Surveillance 	It could be said that sojourners had a more privileged lifestyle than Cubans, because they could afford to employ help for the home. However, domestic staff could also be a means of ensuring surveillance and control of foreign residents by the authorities. Staff were paid in CUC at a rate of 20 or 30 times the local average salary, which was illegal, but often seemed to be tolerated by the authorities. Having these staff in place, while seeming like a privilege could also be seen to a means of maintaining control and segregation, described in 2.4.5.
D	<p>The staff were surprisingly open in their criticism:</p> <ul style="list-style-type: none"> ·disillusioned with the current regime ·the revolution was no longer alive, because a minority dominated and lived a privileged lifestyle (Fred) ·fed up with the obvious inequality of everyday life 	Widespread dissatisfaction but little dissent	Some Cubans expressed dissatisfaction towards what they saw as the growth of elitism and inequality in society, which, for them, had evolved since the Special Period in the 1990s, possibly due to the malfunctioning economy and scarce resources, outlined in 2.4.4. Social

			<p>control could be seen to create fear of authority and compliance amongst the population, despite grumbling informally about the current regime. Punishments for dissent were reported as harsh – loss of job or status, exorbitant prison sentences, beatings – though control by the authorities could seem haphazard and reactive, rather than necessarily carefully implemented.</p>
E	<p><u>Beni:</u></p> <ul style="list-style-type: none"> ·He never threw anything away ·He came to work by bicycle ·Search for vegetables ·Carried a machete ·Humble position and “self-appointed head guard” ·Domestic staff could be paid 160 CUC a month, which was up to twenty times the average wage of a university professor or a hospital doctor 	<ul style="list-style-type: none"> ·Ordinary Cubans were tied up with survival due to scarcity and lack of opportunity ·Widespread fear of and respect for authority, which is coercive rather than legitimate ·Unequal access to earning power through 	<p>Most Cubans were deeply affected by the Special Period after the collapse of the Soviet Union, which can be seen to be the origin of scarcity. There were many like Beni who would hold onto habits and practices developed in that time, such as hoarding and self-preservation. The bicycle became the only real means of transport and public transport to this day is very poor quality and unreliable. This could also be seen to reinforce the mechanism of control, as people cannot move easily from one place to another and are tied up</p>

		<p>privileged position of some people</p>	<p>with day to day survival amidst chronic shortages and low wages, as indicated in 2.4.4. The search for food is an example of how time is taken up - vegetables are produced locally and are not easily available. The role of authority in daily life is also prominent and the perception of position and importance can be a means of gaining privileges.</p>
F	<p><u>Phyllis:</u></p> <ul style="list-style-type: none"> ·Failed to turn up for work ·Told policeman that she worked for foreigners, describing the advantages and extra money that this brought to her family. ·Arrested and told to never go back to the house. ·Her husband was a military man and, as such, had to set an example, otherwise, it may have been allowed. ·All of the staff lived in constant fear of being caught and stopped from working 	<ul style="list-style-type: none"> ·Fear of losing job and livelihood ·Inequality ·Social control 	<p>This incident indicates the level of vulnerability of those who worked illegally for foreigners, on the one hand, and how inequality can be seen to have emerged out of the dual economy on the other, described in 2.4.4. Informal working seemed to be allowed to happen in some measure, as it could give the authorities further access to monitoring foreigners, who tended to live a separate existence in certain residential areas,. But it would have to remain clandestine. The level of dependence on this illegal working was clearly extensive, often covering several generations of</p>

			families, as the salaries were 20 or 30 times the local average, as described by local people.
G	<p><u>Simona:</u></p> <ul style="list-style-type: none"> -Many locals accessed the convertible currency through “unofficial” earnings with international organisations, tips from tourists or through the informal economy. -Use of the two currencies effectively created a two tier society -Would not draw attention to her extra earning power, or would discretely smuggle in extra food or shopping for fear of being challenged and denounced to the CDR. -Everyone was aware that certain individuals were placed in embassies from the Communist Party. -Domestic staff could be paid 160 CUC a month, which was up to twenty times the average wage of a university professor or a hospital doctor 	<ul style="list-style-type: none"> -Inequality in access to the dual economy created social tension through the informal economy and increased the need for control -The illegality of this widespread practice is risky 	<p>Employment in the tourist sector and with international organisations in Cuba seemed to be highly sought after, as described in 2.4.4. Although all employment was controlled by the state and an “official” wage was paid to the state, individuals often received an “unofficial” salary in CUC. While this was illegal, it seemed to be tolerated in most cases, although it remained a risk. This practice was a key part of the dual economy and could be a major source of inequality in society, as discussed in 2.4.5.</p>
H	<p><u>Amy</u></p> <p>The drama of everyday life:</p>	<p>Uncertainty, vulnerability and inequality</p>	<p>A dysfunctional economy can be seen to be at the heart of Cuba’s daily</p>

	<ul style="list-style-type: none"> ·power and water cuts ·persistent breakdowns ·food shortages ·dysfunctional economy ·lack of initiative ·frequent complaining ·sense of pending disaster ·fear of arrest ·inequalities in accessing services and accommodation 	<p>become part of everyday life, which can affect adjustment</p>	<p>problems, as it strives to provide for a population of 11 million, 10% of which is engaged at some level in the security forces. Salaries are comparatively low, daily shortages and malfunctions are frequent and there is unequal distribution of access to goods and services, as described in 2.4.4. The “drama of everyday life” could be seen to be played out in a tragedy of inequality, opportunism and exploitation between groups of people vying for limited resources.</p>
I	<p><u>Manuel</u> People worked in fear of losing their job</p>	<p>Life is volatile and produces fear and anxiety</p>	<p>Cuba can be described as a society where there is a high degree of “power distance” (Hofstede, 1991), in which the authority structure goes largely unchallenged, though deference in interaction is largely symmetrical (Clyne, 1994) across Cuban society, possibly as a consequence of the revolution. As explained in 2.4.2, the Cuban revolution is seen as the source of that authority, although, in</p>

			practice, it can be seen to create a chronic sense of insecurity, in this instance, in the workplace.
J	“Relationships are everything” in Cuba	Life is politicised and there is no recourse to independent mediation	The reported lack of separation of powers in the governance of Cuba and the resulting lack of independent structures for such things as recruitment and mediation in the workplace (Foreign and Commonwealth Office, 2014) could mean that the main way of achieving goals was by influencing those in power, particularly in a situation of scarce resources.
K	<u>Juanito</u> Inequality was at its most heightened in the tourist industry and where there is the starkest contrast between short term sojourners and the local population. Tourism exists alongside a harsh social reality	Opportunism and exploitations become part of the interface between sojourners and the local population, which can affect sojourner adjustment	As described in 2.4, tourism was introduced into Cuba on a large scale during the Special Period in the 1990s in order to earn foreign currency for the government. A dual economy has ensued which has contributed to the creation of an unequal society, where opportunism and exploitation have become two sides of the same coin. On the one hand, sojourners can be seen as an opportunity to

		<p>earn in CUC, while, on the other, Cubans can provide services at low rates and can be exploited. Methods of social control tend to segregate sojourners from the local population and inequality could be seen as more in evidence away from the renovated touristic areas. Overcrowding and dilapidation was apparent and tourists tended not to stray into these areas. Tourism could be seen as a thin veneer for an underlying, harsher social reality in Havana, tightly controlled and closely monitored. Getting used to this can be challenging for sojourners and the problems involved can be an impediment to sociocultural adjustment.</p>
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Table 5.3 Analysis of living with inequality

5.2.3.8 Comments on living with inequality

This section presents accounts from or about the challenges that Cubans were seen to face in everyday life and is relevant in order to present a “thick description” of local life in which sojourners had contact with the local population. The data is relevant because it throws light on the sociocultural context that sojourners interacted with. What emerges is a complex of attitudes and experiences amongst Cubans which brings into evidence differences in perspectives on everyday life, the revolution and

the regime and the inequality and vulnerability of certain individuals (“insiders and outsiders”, according to Simona in row G) and, possibly, sections of society, as outlined in the description of the local context throughout Chapter 2. Older people, for example, had first-hand experience of the revolution, while younger people only the penury of the Special Period and the growing sense of repression and inequality of more recent years, as discussed by Kim’s domestic staff (rows A-F). However, the disillusion and passivity felt by Kim’s employees, together with the fear, lack of confidence and sense of drama and injustice described by Amy and Manuel (rows H and I) seemed to pervade all ages, although these were mainly unofficial accounts from individuals not directly connected to the authority structure of society.

For sojourners, this contact with locals varied greatly and was really dependent on their ability to speak Spanish and their willingness to interact on a sociocultural level, which brings into view research literature on individual aspects of adjustment and intercultural competence outlined in 3.3.3.3, summarised in Aycan (1997) and Byram (1997), although definitive empirical evidence for this area of research is lacking (Ward et al, 2001). In the case of Kim, as with Naomi in the previous section, engagement with the sociocultural context comes across as positive, although there is an ambiguity in the role of domestic employees who can be seen as part of the monitoring process of sojourners by and for the authorities.

As well as this, sojourners could be seen to contribute to inequality in that they had access to better accommodation and foreign currency, which enabled them to build a more materially privileged lifestyle during their sojourn (as indicated in rows A, B and C), but they could also feel uncomfortable, given the conditions of life that Cubans had to endure (described in rows D, E and F). An attachment to the past and its mythological glory, common to “cold” societies (Levi-Strauss, 1991), an intolerance for the current political climate and the social consequences of economic decline could all be seen to mark the demotic discourse in everyday interactions. This is described more vividly by Amy in row H and brings to the fore the harshness of everyday life, where people struggled to make ends meet, had to endure daily obstacles created by a crumbling infrastructure and were forced to confront the realities of social control, although, control often seemed to be applied in a haphazard and random fashion, which allowed for transgression and illegality (row G). Manuel, in row I, further described what he saw as the injustice of the workplace

and the politicised nature of getting by in everyday life, where people needed to focus on informal networks of acquaintances rather than formal, institutional practices to get what they could. All of this culminated in the arena of tourism, where the everyday merged with the curious outside world (row K) and where the most glaring examples of inequity, exploitation and opportunism came together. In chapter 6, we can see how sociological imagination can again help to make the connection between the role of tourism and the relationship between Cuba and the international community and how this relates to the model for “culture shock”.

5.2.4 Living with personal change in relocation

5.2.4.1 Introduction

The previous sections of this chapter describe the challenges of the sociocultural environment for sojourners in Havana. The influence of an ailing economy and a highly politicised social environment contributed to such problems as scarcity, inequality and insecurity for sojourners in dealing with in the new environment. This section, in contrast, focuses more on the issues of lifestyle change on relocation, particularly the role of the non-working spouse, and the changes that individuals underwent as a result of changes in personal circumstances, rather than as a result of socio-economic environment of a particular context.

5.2.4.2 Elke

“I’m struggling to find a role”

Elke was from Europe, was recently married and had given up her career to re-locate with her husband to Cuba. In her view, international relocation involved a great deal of personal change for individuals, not just for those who worked, but also for partners, children and families in general. She explained to me that, in her case, for example, it was the first time in her life that she had not worked and she had given up a high powered job as a marketing executive for an international company in order to accompany her husband. She felt that she had lost her independence and she said that not earning her own money made her feel vulnerable and affected her confidence and self-esteem. “I’m struggling to find a role”, she commented. She also said that she was concerned about maintaining her employability in the future and admitted that she was taking a risk in giving up work, although she added that she wanted to take advantage of her new life as much as possible. For Elke, the challenge for spouses that had given up a career or their own successful business to

re-locate with their family needed to focus on “creating a sense of purpose”, to occupy time and not become too despondent.

5.2.4.3 Paola

“It’s the spouse that takes the brunt”

Paola was Brazilian and had recently arrived with her husband, a business manager in a large company. Her view was that the responsibilities of spouses increased in comparison with life in Brazil. She explained that while her husband went to work in a fairly familiar environment and had contact with colleagues both on location and back at headquarters, she had had to make the biggest changes in how she lived her life and that this was without the support and companionship of her close family and friends. Her view was that providing for the family in unfamiliar circumstances and in difficult local conditions was stressful and spouses had to provide greater support to their families. She mentioned similar difficulties that Maria had described in 5.2.1.3 in terms of shopping and the black market, but she also talked about the challenge of settling children into a new school environment. Her daughter, she explained, was struggling with transition from an American school, which was making her unhappy, because she was having to adjust to a new school curriculum and new school rules and teachers, while missing her old friends from her previous school. Paola explained that the school was trying to help, but found it difficult to give individual support to her daughter, which put pressure on her at home as the mother. She said that she was the one that had to deal mostly with her child’s adjustment problems as she was not working. Also, while she recognised that her husband’s new job was challenging, and that he was doing longer hours and more travel, she felt that this created extra pressure on her as well, as the main care provider and problem solver in a new place where she knew very few people and had had to cope with new things. “It’s the spouse that takes the brunt”, she said, as, in her view, spouses had to cope with most of the change and all the extra stress for everyone came together at home.

5.2.4.4 Eva

“I feel isolated”

For a newly arrived Nordic lady, Eva, who had re-located because of her husband’s job and had been in Havana for a few months, the main challenge was more about establishing contact with people and being able to move freely. She explained that she had given up her job as a nurse to accompany her husband and that they had no

children. She said that the worst thing for her was the amount of time spent at home alone and that she was finding it difficult to get about easily. She explained that they had still not received their baggage consignment, including their car and that local public transport was essentially for the local population and that taxis were expensive and unreliable. Eva complained that she was not receiving information about what was happening in terms of events for expatriates, because she did not have internet and this made it difficult to meet people and establish new friendships. She recognised that the main source of information was through word of mouth, but this was difficult without having a wide range of acquaintances at the beginning of a posting. She explained that, while she spoke English, she had no Spanish, and she pointed out that many other newly arrived spouses did not speak either English or Spanish and that they found it even more difficult to meet new people. Keeping in touch with friends and family at home was also restricted due to the communication problems she mentioned and many spouses told her that they found it difficult to establish new acquaintances and felt lonely or depressed, "trapped at home". She explained that this was a situation that she was not used to and that, while she was happy to re-locate with her husband, she missed the social aspect of working life and her own independence. As she put it, "I feel isolated" from the world and was feeling down about such a big change in her life.

5.2.4.5 Elisa

"Looking after my family is my job!"

In my time in Cuba, however, I met a number of sojourners who coped well with personal change and adapted to their new location. For example, a South American spouse I knew, Elisa, saw no problem in re-location, as she said that she considered herself as a "professional spouse", managing home affairs and dealing with domestic staff, suppliers and relations with the school while her husband worked. "Looking after my family is my job!" she said and it seemed to me that she was in no doubt as to the value she brought to the family in adapting to the new environment. As she explained, she had never had a job outside the house and was happy not to have had one, as her role was to support her husband and her family in the best possible way. She added that her role was harder in Cuba than at home, because of the difficulty in shopping and finding supplies, and she considered that providing a comfortable home life for her family was a real contribution to their wellbeing.

5.2.4.6 Analysis: Living with personal change in relocation

These cases describe a number of challenges for expatriate sojourners who saw a major role change in their life, particularly the accompanying spouse, due to relocation. These challenges are broken down and analysed in the table below and discussed in the commentary section that follows.

	Challenge	Effect	Analysis
A	<u>Elke</u> She had given up a high powered job as a Marketing Director for an international company in order to accompany her husband	Elke felt that she had lost her independence and not earning her own money made her feel vulnerable and affected her confidence and self-esteem	Giving up a career to relocate as an accompanying spouse can represent a big change in role for someone who is used to being independent (Harvey, 1985) and refer to the challenges and stresses of the non-working partner and other family members in relocation, discussed in 3.3.6.2.
B	“I’m struggling to find a role”	Difficulty in adjusting to new life and environment	Giving up work and relocating for the sake of her husband’s job left Elke facing both a new environment and a new lifestyle, a role which she struggled to adjust to, as indicated by Lazarova et al (2010)
C	“Creating a sense of purpose”	Proactive in resolving the challenge she faced	Elke shows that, despite her situation and feelings, she was determined to make the best of it and use her own personal resources to overcome obstacles. The importance of finding solutions from within and having a positive attitude to relocation

			is considered an important factor in adjustment in adjustment literature (Caligiuri et al, 1998).
D	<p><u>Paola</u></p> <p>She explained that while her husband went to work in a fairly familiar environment and had contact with colleagues both on location and back at headquarters, she had had to make the biggest changes in how she lived her life)</p>	<ul style="list-style-type: none"> ·Responsibilities of spouses increased ·Had to deal with relocation issues (set up home, shopping, school changes, busy husband) ·Work, home school life more interconnected 	<p>Relocation is much more than a new job for an employee and there are many challenges in the living or non-work environment. Black & Stephens (1985) identified different “domains” of adjustment and Bolger et al (1989) and Westman (2001) apply the concepts of “spillover” between domains and “crossover” between individuals, all of which is introduced in 3.3.6.4. For this study, it is clear that the conditions of life in Havana might intensify these issues</p> <p>How they overcame challenges is discussed in the section 5.3, which focuses on adjustment, and in the following discussion chapter.</p>
E	<p>She was without the support and companionship of her close family and friends</p>	<p>State of mind and emotional wellbeing affected</p>	<p>The importance of social support networks in relocation is a common theme in the adjustment literature (Ong and Ward, 2005). The loss of familiar networks can create psychological adjustment issues, particularly in a</p>

			location such as Havana, where there are considerable restrictions to contact and communication, as described in 2.4.6.
F	<u>Eva</u> Time spent at home alone by spouses	<ul style="list-style-type: none"> ·Feelings of being “trapped” and of “isolation” ·Problems of psychological and sociocultural adjustment ·Importance of language for adjustment 	The need to build personal social networks in a new environment can help adjustment (Krackhardt, 1992). Isolation is an important impediment to psychological adjustment (Ward et al, 2001), while language ability is an important sociocultural adjustment facilitator (Ward and Kennedy, 1999). These elements are brought out in the section 3 of this chapter, which focuses on adjustment, and in the following discussion chapter.
G	<u>Elisa</u> was a “professional spouse” - not everyone had personal problems with relocation	Fewer adjustment problems	Adjustment problems are relative to the individual and this case indicates that there are personal choices and attitudes that individuals bring to a context, no matter how difficult (Searle and Ward, 1990). Some sojourners have a very pragmatic approach and perhaps do not seek a deep intercultural experience on relocation and remain distant from the local

			<p>sociocultural environment (Selmer and Luring, 2009). This is discussed in more detail as a factor in adjustment in Section 3 of this chapter.</p>
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Table 5.4 Analysis of living with personal change

5.2.4.7 Comments on living with personal change in relocation

These accounts outline the changes in lifestyle sojourners underwent as a result of re-location, particularly accompanying spouses, and the challenges of changing roles and responsibilities. As Copeland and Norellc (2002) point out, satisfaction with family relationships has been shown to be significantly associated with women’s psychological adjustment to relocation and satisfaction with life throughout the expatriation process (Black & Gregersen, 1991; De Cieri et al., 1991). The position and challenges of the non-working, or “trailing” spouse (Harvey, 1985 and 1998) was a common theme in Havana, as there was little possibility of employment other than that officially sanctioned by the Cuban authorities and local conditions and restrictions could create frustration. The change in lifestyle that Elke experienced, for example, as a result of giving up work had a substantial effect on her state of mind (rows A and B), although she personally tried to overcome her new circumstances (row C). While these challenges did not have their source in the local environment, because they were the result of personal decisions to re-locate, I have included them in this study because the context of Cuba contributes to increased isolation and difficulty in adjustment, particularly because of the restrictions on communication and media described in 2.2.6, which inhibit contact with people from the home country and the ability to easily set up social arrangements without having to rely on word of mouth (a strong feature of the local context due to these restrictions) and develop personal networks.

At times, however, it was clear that the changes that spouses underwent in their personal circumstances could produce added stress and concern for some. Others managed to adapt and reap the benefits that the new environment had to offer them (contrast Elisa’s approach in, for examples, row G with the previous rows, for example). Positive attitudes toward the international assignment within the family can help facilitate coping behaviors rather than on anxiety (Copeland and Norellc, 2002),

turning the family relationship into a positive force, which would lead to better adjustment. Caligiuri et al. (1998), for example, reported that families with a positive perception of moving internationally adjusted better to living in the host country than did those families who perceived the global assignment as negative.

On the other hand, changes in family circumstances and responsibilities as a result of the spouse not working and spending more time at home were often mentioned as a reason for altering the balance of duties and the nature of relationships in families or couples, as described by Paola (row D). The impact of the international transfer is more than likely more severe on the spouse, as she is the member of the family to undergo most changes in lifestyle as a result of relocation (Harvey, 1985; Copeland and Norell, 2002), particularly those that had to give up a career and paid employment to re-locate, and their level of morale could affect the adjustment and the well-being of other family members, although children and the person starting a new job could experience increased demands and difficulties (row D). Home and family life could be considered a focal point for all sojourners across the domains, as both a refuge and a forum, as the main source of support for all in an unfamiliar environment and in the absence of familiar support systems. Daily life, work, school, social life and so on, were possibly more inter-connected and “dense” in such a close expatriate environment (Milroy and Milroy, 1978), particularly as sojourners were closely monitored and actively segregated from local Cuban life. Individuals frequently met each other in these different domains and knew each other’s families. A problem at school or at work was shared by all in a more intense way. The extra pressure on family relationships, as a result of spillover between work and home and crossover between individuals, could create added frustration and stress and the absence of familiar support networks denied individuals from solace and help at a time of need (row E), as summarised by Haslberger and Brewster (2008). Eva, for example, found that, without her normal support networks, which she described as friends and family at home, there was a danger of becoming isolated and feeling trapped without a sense of purpose or occupation (row F). How individuals cope with these aspects of relocation are picked up in the following section below, which focuses on adjustment.

5.3 Focus on adjustment

This section presents and analyses cases which are examples of how sojourners described how they dealt with the challenges that they faced in their new

environment and the coping strategies that they developed in order to adjust. As we have seen in 3.3, adjustment is seen as a multi-faceted phenomenon involving affective, behavioural and cognitive processes across different domains (work, general living and social interaction) and types (psychological, sociocultural, role adjustment) being applied to new cultural environments. We shall see that specific areas come to the fore as acculturating factors (Berry, 1997), including “psychological adjustment” (Ward et al, 2001) and “social support” (Ong and Ward, 2005), or help from others, the role of social networking and in-group dynamics (Tajfel, 1982), and interaction and adjustment to the wider sociocultural context or “sociocultural adjustment” (Ward et al, 2001).

I have organised and presented the data in the form of cases in three thematic sections in 5.3.1, 5.3.2 and 5.3.3. As in the previous section, which focused on “Challenges”, within each of these sections I first present individual cases of sojourners and Cubans who I met in my time in Havana, characterised by a quote from each one, which characterised the adjustment factor that they were explaining to me. I then present the main coping strategy that I identified from all of these encounters in table format in order to be able to analyse the underlying topics. In the first column of the table, entitled “Adjustment issue”, I lift out from my report of each case what I identify, as researcher, as the key issues that each case had in their adjustment process and, in the second column, entitled “Coping strategy”, I list what factors helped to resolve the issues described. In the final column, entitled “Analysis”, I seek to trace “linkages” (Mills, 1959, p. 7) between coping strategies and factors within the frame of social structure and the wider research context in order to benefit from sociological imagination. Finally, in the section entitled “Comments”, I consider all the elements and provide a summary analysis of the whole topic from my perspective as researcher, and each one of these is then discussed further in the final chapter, along with all the other sections.

5.3.1 Support and resources for adjustment

5.3.1.1 Introduction

The importance of “social support” in adjustment is outlined in the literature review in 3.3.5 and is summarised and categorised, as we have seen, by Ong and Ward (2005) into four functions, including emotional support, social companionship, assistance and information. This section outlines some examples of the more

practical elements of support provided by organisations, such as employers or sponsors, but also looks at how individual used their own resources to cope with adjustment.

5.3.1.2 Irina

“I couldn’t manage without all this help”

Irina was a diplomat from Europe who talked to me about the support her embassy gave her and her colleagues and how it put a lot of resources into making sure that the expatriate staff and families were well looked after and made welcome from the beginning. On immediate arrival, she explained, this was in the form of information packs or basic food supplies, coupled with an assigned person to take newcomers on a tour of the main areas for shops and facilities. Irina added that a large maintenance team helped new arrivals set up house and provided regular maintenance throughout the year and help with emergencies, particularly in the hurricane season, including boarding up windows before a storm and removing debris afterwards. She described an incident when an old fuse box outside her house had caught fire and how the maintenance team had come outside hours to help put out the fire and call in the state electricity company to reconnect everything. She also described how some embassies provided a security service which patrolled the houses where their employees lived and even collected rubbish and delivered supplies as needed. Of particular help, she mentioned, was how her embassy helped her with bureaucracy on arrival and with importing tax free supplies, because it could take months for things to be cleared through Customs. Forms had to be filled in meticulously, she explained, and would be sent back if the wording or layout did not tally precisely with the instructions given by the Ministry, which caused further delay.

Irina recognized, however, that some embassies provided more support to employees than others and that there were some that provided little support, particularly the small embassies, who, she said, did not have a lot of staff to help out. As well as embassies, she said, there were many non-diplomats, who had to fend for themselves or ask other sojourners for help. Irina told me how she and others often helped local friends out by ordering things for them through the diplomatic consignment, although this was not supposed to be allowed. But, she said, “I couldn’t manage without all this help” and she explained how she tried to help others who had no support.

5.3.1.3 Marc

“There’s no support”

As Irina mentioned above, however, not all sojourners got support from their employer. A newly arrived embassy attaché, called Marc, for example from a European embassy, went as far as to say, “There’s no support”. This, he explained, however, was more to do with his status as an “attaché”, rather than a full diplomat. He told me that he had been assigned to the embassy from a ministry in his country to look at security collaboration in Cuba and that he had had to work from his embassy with diplomatic status as an attaché, because he needed an official visa to work in Cuba. However, he explained that the embassy had told him that he was “not a priority” and that the embassy maintenance team were busy with other projects and could not help him with repairs to his house. This meant that he and his wife had to look for building materials and furniture themselves and it was fortunate, he said, that they both spoke Spanish. At a later date he told me that things had improved, as the maintenance manager had moved on and his replacement was more helpful and would assign the team to his property when he could. This seemed to me at the time an unfortunate experience, as help and support seemed an important part of coping and adjusting to Cuba at the beginning.

5.3.1.4 Ricardo

“You have to be positive and open!”

Apart from embassies, there were a number of large companies working in Cuba, as described in 2.5.3.2. Ricardo worked for a large South American engineering firm designing a large infrastructure project for the Cuban government. He told me that he was very pleased with the support he had received from his company on arrival and that the company had very close relations with the embassy. He said that he did not see much difference between diplomats and his own colleagues, as the embassy invited them to social events and treated them well, helping with bureaucracy and getting supplies. However, he admitted that not everyone had support and that he knew a lot of business sojourners who had to rely on others for help, but that meant, he added, that they knew more people and had met more local Cubans. His view was that people with a lot of support from large institutions, had to make less effort and had less contact with their surroundings. He complained that many of his colleagues only socialised amongst themselves were negative about life in Cuba, sometimes making jokes about Cubans and criticising their way of life. “You have to

be positive and open”, were his words and take advantage of what is on offer, he said. He told me how he had more free time and time with his family than back in his home country. He added that he and his family had “more help in the home”, “a better school” and were “more active”. He also said that being in Cuba was a “fantastic experience” for all his family and that “being open to new things” and “tolerant” of a different way of life.

5.3.1.5 Marta

“Spanish is essential”

I met other sojourners who lacked support from an institution. Marta, for example, was a university lecturer whose embassy had arranged a placement for her at the University of Havana, although, she said that they could not help her with settling in as she was on a local contract with the university. She told me that she had taken six months to find permanent accommodation and had not managed to clear her personal belongings through customs. She explained that the bureaucracy was complicated and required excessive paperwork and frequent visits to offices to sort out details. At the university, she explained, they had told her that apart from write a letter of introduction for her, they could not intervene with the work of another ministry. Marta said that she had to do everything herself, but had also got some help and advice from sojourners that had been in Cuba for a while. She explained how she thought that having previous experience of Latin America and fluent Spanish was really important. “Spanish is essential”, she said, as in the ministries they did not speak anything else.

5.3.1.6 Carlos

“We are enjoying Cuba!”

In my time in Cuba, however, I met a number of sojourners who coped well with personal change and adapted to their new location. A South American diplomat, Carlos, for example, told me that he recognized that he and his wife were in an extremely privileged position, although they had not wanted to come to Cuba. Realising that local conditions were harsh for most, he explained that they had opted to rent a new flat built by the Cuban authorities for foreign residents in a condominium near the sea. While he realised that they were more subject to surveillance like this and the flat was overpriced for what it was, it also meant that they could access technical maintenance support when needed, as well as internet

and cable television, and that they were free to enjoy their free time. He explained that his wife had managed to find a job in his embassy in the visa section and that they paid for home help and that their one small child was going to the international school all of which, he told me, was an improvement on their home life, particularly for his wife. He told me that both he and his wife had had no problem adapting to Cuba. “We are enjoying Cuba!” he said, despite their reticence at the beginning and he recognised that his wife did not face the challenges that others faced.

5.3.1.7 Analysis: Support and resources for adjustment

	Adjustment issue	Coping strategy	Analysis
A	<u>Irina</u> Arrival and settling into a new environment	The embassy provided support: ·Info packs ·Assistance ·Setting up home ·Maintenance ·Security and services ·Help with bureaucracy	Research into the process of adjustment in expatriates has indicated that social support plays a key role in reducing stress when adjusting to a new environment (e.g., Adelman, 1988; Fontaine, 1986; Walton, 1990). The definition of social support varies within the literature, but Ong and Ward (2005) conclude that practical support is central psychological well-being. Including “tangible assistance” (concrete help in terms of financial assistance, material resources or required services) and “informational support” (receipt of opinions and facts relevant to current difficulties), which Irina indicates were so helpful to her. Other aspects of social support focusing on social

			network building are analysed in the following section.
B	<p><u>Marc</u></p> <ul style="list-style-type: none"> -Not all sojourners got support from their employer -The embassy had told him that he was “not a priority” 	<ul style="list-style-type: none"> -Fended for themselves -Used Spanish 	<p>Marc describes how he was excluded from support by the main group within his organisation, at least for a time, and considered as an outsider. According to Social Identity Theory, group membership constitutes a fundamental part of an individual’s identity and how they protect their self-esteem (Tajfel, 1982). Selmer and Luring (2009) use this theory to explain the overriding power of the “in-group” within an expatriate compound in Saudi Arabia, where members are pressured to conform to in-group “rules”. This is analysed further in Ursula’s case in 5.3.3.4 below.</p> <p>In response to this, Marc and his wife used their own personal resources as a coping strategy and their fluency in Spanish was an important aspect of this. The importance of language fluency is prominent in adjustment research. Shaffer and Harrison (1998), for example, found that language</p>

			<p>fluency was an important antecedent to the adjustment of spouses on international assignment, as they needed to interact with host country nationals on a regular basis while setting up home and taking care of their family. This is consistent with the findings in the expatriate adjustment literature (Black, 1988), in which language fluency is seen as a necessary tool for interaction with host nationals and a means of sociocultural adjustment. In the context of Cuba, because of the fluency in a lingua franca such as English or French was also important for social contact amongst expatriates. The importance of language fluency is also discussed in the section 5.3.3. on sociocultural adjustment.</p>
C	<p><u>Ricardo</u> Support varied for sojourners</p>	<ul style="list-style-type: none"> -High level of support and resources from a large company -Good relationship with embassy 	<p>Like Irina, Ricardo spoke of good support and in-group relations, despite not being a diplomat, which re-iterates the importance of support in this context. The level of resources available to individuals on arrival could be influential in the degree of success in adjusting to a new way of life.</p>

			Searle and Ward (1990), for example, conclude that, amongst other things, the level of resources and support available to individuals and an individual's personal and family situation have an impact on adjustment.
D	Coping with a new environment and way of life	<ul style="list-style-type: none"> •Had a positive attitude and tolerant of environment •Took advantage of the sojourn 	<p>A positive approach to relocation is indicated in some research as a valuable personal resource for coping with changed circumstances. Caligiuri et al (1998), for example, found that spouses and families who had a "positive attitude" towards living overseas adjusted better to their new environment, while Mohr and Klein (2004) emphasised attributes such as "experience", "motivation" and "openness" in order to set up new "friendship networks" and gain "a sense of control".</p> <p>Ricardo is an example of how some sojourners in this context took advantage of the environment to seek opportunities for self-development, such as learning a language or taking a class in a new activity or just discovering their environment and meeting many new and</p>

			different people. This is analysed in further detail in the following sections.
E	Those with more support were less open and positive	<ul style="list-style-type: none"> -Socialised within their own work or national group -Avoided contact with local sociocultural environment 	<p>Ricardo makes the point that sojourners who were willing and able to have more direct contact with local people tended to be more positive and proactive in engaging their changed circumstances to get the best out of their new environment. This is supported to a degree by research. Parker and McEvoy (1993), for example, cite personality characteristics, such as open mindedness, cultural empathy, creativity, sense of humour, integrity, sincerity, stress tolerance and extroversion as possible defining factors in successful adjustment, though these qualities would need to be clearly defined. As Ricardo described, some sojourners did not respond well relocation and their new environment and preferred to seek refuge in the familiar, socialising only with their own national group or work colleagues, which could often create a dismissive attitude towards local life. As we have seen in</p>

			3.2.2.2, this can lead to a process of “otherisation”, which stereotypes or labels local behaviour in a negative way (Holliday et al, 2004). It could be concluded that such a situation is an obstacle to sociocultural adjustment and this is discussed further below in 5.3.3.
F	<u>Marta</u> No institutional support from employer or sponsor and had to deal with complicated bureaucracy	·Used her own resources of previous experience and fluency in Spanish ·Sought help from others informally	By using her own skills and experience, Marta sought to overcome sizeable obstacles in the absence of support. Some research indicates that language ability and previous experience of international assignments adjust more easily (Mohr and Klein, 2004). Research has also indicated that social support plays a key role in reducing stress when adjusting to a new environment (e.g. Adelman, 1988; Fontaine, 1986; Walton, 1990). There is a good deal of evidence to suggest that problems may be alleviated with the right support mechanisms, which can impact positively on both the psychological and sociocultural level and alleviate loneliness, stress and

			depression (Searle and Ward, 1990; Ong and Ward, 2005)
G	<u>Carlos</u> Recognised the harsh local conditions and high level of control and cost of accommodation	He made a specific lifestyle choice and his wife worked	Carlos demonstrated a very pragmatic approach and perhaps did not seek a deep intercultural experience on relocation and remained distant from the local sociocultural environment. He accepted the limitations of the location, but got the best out of the experience for enjoyment.

Table 5.5 Analysis of support and resources for adjustment

5.3.1.8 Comments on support and resources for adjustment

From the above a distinction can be made between *institutional* support and resources, which were provided by an employer or a local sponsoring organisation, such as a university or ministry, and the *personal* resources brought to bear on the context by individuals themselves, also indicated as important by previous studies (Anderson, 1994; Lazarova et al, 2010). In terms of support provision, there is a marked contrast between the cases of Irina and Ricardo (rows A and C), on the one hand, who worked for large organisations, and Marc and Marta (rows B and F), on the other, where support was either absent or denied. According to Irina’s account, if the employer gives support it can help personal adjustment (Ong and Ward, 2005), although it can also create a dependence on work colleagues, which, in turn, can tempt sojourners to turn inwards towards closed and dense (Milroy and Milroy, 1978) expatriate groups for solace and solidarity, rather than becoming more involved in the sociocultural life of the local context. In contrast, where the role of the employer is weaker or absent, or an individual is excluded from an in-group, such as Marc and his wife (row B) and Marta (row F), this could oblige people to use their own personal experience and resources to achieve their goals. Some of these resources are described in this section and can include concrete qualities, such as experience of living in other locations, foreign language ability and a positive and open approach to new surroundings and changed circumstances and so on. The usefulness of having

Spanish in Cuba would seem to be a big advantage in adapting to the local context, both in terms of accessing resources and understanding how things worked and what life was like, particularly amongst sojourners that had to rely heavily on personal resources, such as Marta. This could be a good base for overcoming the stress and difficulties of relocation, as Ricardo describes (row E), although it is possible that the level of resources that Ricardo had influenced his experience. Attitudinal factors could also be important, as Carlos demonstrated (row G), in that he demonstrated a pragmatic by accepting challenges in the environment, which he overcame by making certain decision of how he wanted to experience his new life. All of this may be of benefit in the adjustment process and may increase engagement with the local population.

Overall, then, personal resourcefulness - the ability of an individual to overcome obstacles and problems by themselves - could be a key factor in adjustment to a new lifestyle and environment. The personal, professional and lifestyle changes that international expatriates can experience may require them to dig deep into their own personal resources in order to develop coping strategies for the increased demands of international relocation. In the case of Havana, the challenges for individuals and their families were reported as being substantial, in contrast to what they experienced in their usual familiar surroundings in their home country. Also, to conclude, another aspect of social support is the degree to which it affects sociocultural adjustment. Where institutional resources were substantial, sociocultural adjustment could be affected. In Ricardo's case (row D), it could be argued that not having to cope with obstacles, allowed him to get involved in the local context and take advantage of his surroundings. However, the high level of social support and social companionship within larger in-groups (mentioned in row E), while providing a lot of emotional comfort, could result in a process of "enclavism" amongst expatriate sojourners, where groups of expatriates form closed groups amongst each other and reject contact with their environment, as described in some of the adjustment literature (Church, 1982; Adler, 1991; Kealey, 1989). Sociocultural adjustment is analysed further in 5.3.2 and 5.3.3 below, which looks at social network building amongst sojourners and the local population.

5.3.2 Building social networks

5.3.2.1 Introduction

Apart from practical support and the need to satisfy certain material needs, such as setting up home, settling a family and learning about where and how to obtain basic goods and services and how things work in a new environment, sojourners talked about their experiences in getting to know people and establishing personal relationships with others on relocation, although this is an important part of life in many change situations. This aspect of social support is defined in terms of the availability of “helping relationships” for people in need (Kraimer et al, 2001) and a good deal of evidence exists to suggest that problems may be alleviated in expatriate relocation with the right supportive relationships, which provide “emotional support” and “social companionship” and which can impact positively on both the psychological and sociocultural level and alleviate loneliness, stress and depression (Searle and Ward, 1990; Ong and Ward, 2005). This section focuses on social companionship and relationships amongst sojourners and the impact that these had on coping and adjusting to Cuba.

5.3.2.2 Juana

“What helps? Meeting people!”

Juana was European and was accompanying her husband on assignment with an embassy. She talked to me a lot about when she first arrived in Havana. In her view, it was important, she said, to get to know people in order to settle in quickly, as she had noticed that expatriates who had been in Havana for a while knew where to get supplies and how to access services that were not easily available. She explained that her husband’s embassy was small and that, unlike in the larger embassies and companies, there weren’t many work colleagues and their families, so it was important for her to get to know other people. “What helps? Meeting people!” she said. Juana also talked to me about how the move to Havana had meant that they had lost the friends and contacts from their previous location and she said that she was frustrated by the restrictions on access to the outside world imposed by the Cuban authorities. For her, this also made it difficult to stay in contact with friends and family back at home, which, she told me, made her determined to get to know people as soon as possible.

Juana told me that she thought that the best way to do this was through the international school her children were going to, as “everyone is in the same boat” and that she could make contacts for all the family. She explained that parents could get to know each other either informally at the school gates or through social evenings and events organized by the parent-teacher association. Juana also told me that the school’s “transition project”, which was aimed at children and families arriving and leaving the school as part of a school development initiative, was also a good way to talk about common problems and get support. It included a “buddy system”, she said, for new children on arrival to help them get used to the school and prior email contact with classes to make contact before arriving. She also explained that the school invited parents to workshops and focus groups on transition to discuss issues and problems that anyone was having with settling in and getting used to Havana. Juana told me that she had attended some focus groups and social events along with other newcomers in the school to discuss their initial feelings and views about arriving in Havana and the role of the school in helping families settle and that this had been a good way to get to know people, too.

5.3.2.3 Valentina

“Everyone knows everybody’s business!”

Valentina, a South American accompanying her husband who worked at an embassy, described the social life amongst expatriate sojourners in Havana to me as “lively” because, she said, there was a real need to “pull together”. She explained that people needed to share information on where to get things and on what was happening with the authorities. For her, dinner parties, barbecue lunches, coffee mornings, family sports outings and such were a common occurrence and went a long way in providing support and companionship. Valentina described how she had hosted a Christmas lunch for her friends and their visitors and one couple visiting sojourners from the south of England at this lunch commented to her on how amazed they were at how many people got together for the festive period and how close they all seemed – a real “sense of community”, they told her, she said. She also reported that these visitors had noted how everyone knew “so many people after such a short time in Cuba” and had reflected on how difficult they themselves had found moving to a new area back home, where life was more settled and friendships more static. Valentina pointed out to me that the turnover of people in Havana was much greater than “back home”, with new people arriving and leaving all the time, and that it was

unusual to find so many people living in similar circumstances temporarily as in expatriate life. Valentina also explained that people often needed a lot of support if something went terribly wrong. She described how people had pulled together to help other sojourners in difficulties, including a case of bereavement, an arrest and when someone had to go into hospital, by providing meals, doing shopping, making phone calls, ferrying people around or helping with translation and so on. In some respects, however, Valentina said that it could feel a bit claustrophobic at times, as, she said, everyone knew everyone else. Families knew whole families, she said, and “everyone knows everybody’s business”, as everyone worked together, socialised together and went to school together and so on, although, she said, people socialised with different groups to avoid this.

5.3.2.4 Jaime

“We all club together”

I realised that life was different for different types of sojourners and that sojourners without diplomatic status had different ways of coping. Jaime, for example, a businessman I met at a business dinner, talked to me about the importance of helping each other out, as, he pointed out, they didn’t enjoy the benefits of diplomatic consignments, which allowed for imports of all sorts of extra items to supplement the local economy. However, he mentioned that it he had managed to get to know people from his embassy through the business group he ran for local business men on the island, because, he explained, embassies were interested in increasing trade to the island from their country and needed local knowledge and contacts to do this. As a result of this collaboration, he explained, he and others in the group could benefit from diplomatic assignments and import a large amount of basic goods not available locally. In return, he said that he and the other members of the group would always help newcomers from the embassies and share information about how to buy some essential item or luxury good locally through informal channels or through garage sales. “We all club together”, he said and help each other.

5.3.2.5 Afrina

“I felt lonely”

There were other specific groups amongst sojourners that seemed to me to require some form of membership depending on circumstances. Some very specific ones were groups such as “Asian women”, or “African women”, which were a source of

social contact for spouses and provided companionship and support. One spouse, for example, called Afrina from Malaysia, explained in one of the focus groups that I attended in the school transition project mentioned above, that she had very little chance of meeting other women. “I felt lonely”, she said, and explained to the group that, back in her home country, she had worked as an accountant and she described how most of her social contact was now through her husband’s job at the embassy, where many of the diplomats were single men. She said that she was very glad of her Asian women’s’ group for friendship, which she said was “appropriate for a married woman”. Through my contact with other sojourners, I came across other examples of specific groups, including prayer groups, choir groups, book clubs and so on. There were also other groups that arranged activities at certain times of the day for specific activities, such as yoga or tennis lessons early in the mornings, arranged early to avoid the heat and humidity of the day, or outings amongst work colleagues at the weekends.

5.3.2.6 Analysis: Building social networks

These cases describe a number of strategies that sojourners adopted in order to build a network of social and supportive contacts within their new environment. These actions were largely as a result of a lack of some form of formal social support systematically provided by an employer or a host organisation and tended to spill over from different domains and sojourner groups. The issues are broken down and analysed in the following table and discussed in the following section.

	Adjustment issue	Coping strategy	Analysis
A	<u>Juana</u> Unlike in the larger embassies and companies, she could not depend on a wide network of work colleagues and their families	She made friends through the school by getting involved in activities	Although many sojourners relocated with their families, which were an important support at a time of change (De Cieri et al, 1991) they were, in the main, denied important psychological or emotional support from close friendships and the extended family at a vulnerable time,

			particularly in the initial phases of relocation, and this brought into focus the importance of direct contact with others right from the start.
B	<p><u>Valentina</u></p> <p>People needed to share information on where to get things and on what was happening with the authorities.</p>	They created a “sense of community” and socialised together	The particular, close-knit nature of relationships on relocation encouraged by the proximity and spillover (Westman, 2001; Haslberger and Brewster, 2008) of most aspects of life amongst a reduced number of people, also led to a sense of shared destiny or common outlook and helped with “psychological adjustment” (Ward et al, 2001).
C	The move to Havana had meant that they had lost the friends and contacts from their previous location and she was frustrated by the restrictions on access to the outside world imposed by the Cuban authorities	She got involved in expatriate social life and participating in dinner parties, barbecue lunches, coffee mornings, family sports outings	Restrictions on communications, due to censorship explained in 2.4.6 and outlined by Carol above, inhibited the possibility of building wide social networks other than by word of mouth, although the active social life of sojourners possibly facilitated establishing both a network of weak ties initially and stronger ties with time (Granovetter, 1973).
D	The volume and turnover of people in Havana was much greater than back	Friends and social gatherings provided close	Black and Stephens’ (1985) domains in sojourner adjustment have largely been collapsed into two domains,

	home, with new people arriving and leaving all the time, and it was unusual to find so many people living in similar circumstances temporarily as in expatriate life	emotional support to people	“work” and “non-work” (Lazarova, 2010) and in this situation, the non-work domain took on added importance, because it was whole families that were going through change. As a result, the non-work domain for sojourners seemed to have quite an intense social dimension and had to be able to accommodate turnover and the fostering of new relationships.
E	Some sojourners experienced difficulties at times, including a case of bereavement, an arrest and when someone had to go into hospital, but had little close family or established friendships for support	Other sojourners provided help, such as providing meals, doing shopping, making phone calls, ferrying people around or helping with translation and so on	The sojourner network seemed a crucial support for others in need. The vulnerability of being in an emergency situation without an extended family network came to the fore, as family members would have had to make long haul flights and commit a lot of time and expense to stepping in to look after children if their parents were suddenly incapacitated. In such cases, the sojourner network was a great support for others in need.
F	It could feel a bit claustrophobic at times and “everyone knows everybody’s business”	Sojourners created alternative networks for variety and greater privacy	Spillover sometimes became too intense and maybe created some problems of “crossover” (Haslberger and Brewster, 2008) between individuals at times. The intense social dimension to expatriate life in

			Havana meant that whole families tended to interact across the domains at work, at school and in social life, which could intrude upon privacy.
G	<u>Jaime</u> Some sojourners did not have access to imports in the diplomatic consignments	<ul style="list-style-type: none"> -Importance of “clubbing together” and helping each other out -Maintain contact with diplomats and help newcomers by sharing information 	There were different groups of sojourners in Havana who were there for different reasons and experienced life differently with different challenges and opportunities, as described in Chapter 1. This is an example how they interacted and shared their advantages and knowledge.
H	<u>Afrina</u> Felt lonely because of limited social contact	Became a member of the “Asian Women” group	There were a number of groups which offered a specific type of support to sojourners and tended to be exclusive and dedicated to a certain sub-set of sojourners. Exclusivity could be defined by the purpose of each group, whether it was offering support and friendship to people who desired specific contact for religious or cultural reasons or for specific interests.

Table 5.6 Analysis of building social networks

5.3.2.7 Comments on building social networks

All of these cases indicate the importance of building social networks in relocation and research has shown this to be crucial for preventing problems of dissatisfaction

of family members and the consequent early repatriation of international sojourners as summarised by Adler (1997) and Ward et al (2001), and in particular relation to spouses by Harvey (1985 and 1998) and children by Weeks (2010). As we have seen, the principal role of support networks was to provide psychological support for sojourners in adjustment (Ong and Ward, 2005; Ward et al, 2001), but this has added significance in Cuba due to its insulation from the world and restrictive environment, described in 2.2, which meant that contact with distant close contacts was substantially inhibited, as described by Juana (row A). Also, the level of surveillance and control experienced by sojourners in Cuba and (described in 2.5 and 4.2.2 above) and the resulting social segregation of foreign residents, engendered a tightly knit and vibrant social life, described by Valentina in rows B and C, who also complained of excessive familiarity and “claustrophobia” (row F), as a result of what can be described as “spillover” between sociocultural “domains” of sojourner life, such as working life, social and home life, which are not independent of each other (Haslberger and Brewster, 2008). In an expatriate context such as Cuba, it could be argued that the boundaries between life domains are more permeable than for those with comparable domestic assignments, as the boundaries between home and work are blurred due to the involvement of the whole family and there is not a clear boundary in one domain from the stress experienced in another domain (Harvey 1985; Luring and Selmer, 2009). However, Valentina also described the turnover and extensive networking of sojourners, which, at the beginning of the sojourn could give access to multiple ties in order to gather information and settle quickly (row D), also considered important in the research literature (Granovetter, 1974). She also mentioned how strong relationships were a source of solace and support in cases of need in difficult times (row E), also considered important (Krackhardt, 1992) and possibly reached a level quite unusual amongst such short established relationships. Furthermore, Afrina (row H) describes how her specific group allowed her to find companionship and how networks also served to enable people with a common interest to share knowledge and resources and help each other find solutions or leverage benefits when faced with the daily hassles and the longer term strains of everyday life, such as the collaboration across social groups described by Jaime in row G. In this sense, the event that Jaime described had the feeling of a very “foreign” event, which was maybe as a result of the authorities tending to keep sojourners segregated from local society coupled with a tendency for sojourners to come together for mutual support.

Overall, then, an important aspect of adjustment is the social network that sojourners built up and which helped them cope with the challenges described in section 5.2, whether it was just providing practical help in finding basic supplies or a new supplier, or for companionship and support in an isolated and controlled environment.

5.3.3 Sociocultural adjustment

5.3.3.1 Introduction

As we have seen in 3.2.4.3, sociocultural adjustment or adaptation is best analysed within a “social learning framework” (Searle and Ward, 1990, p 451), which acknowledges “the importance of interpersonal relationships and social networks” and “specify that friendships with hosts are crucial for learning the skills of a new culture” (ibid, p. 451-2). Beyond the immediate environment of work colleagues and other expatriates, sojourners also had contact with the wider sociocultural environment of local Cuban life, which, as we have seen in section 5.2, presented a number of challenges because of the particular socio-political and economic reality of everyday life in Cuba. As we will see, sojourners dealt with challenges in the sociocultural environment in a variety of ways, ranging from a concerted separation strategy resulting in virtual marginalisation (Berry 1997) to positive engagement, leading to a degree of integration and a fairly deep intercultural experience.

5.3.3.2 Monique

“It’s hard to get to know Cubans”

Monique had been in Cuba for six years, and her husband was a European businessman who worked for an international company with a well-known brand operating a “joint venture” with the ministry. Monique told me that she had got to know a lot of Cubans and that she was enjoying Cuba. She explained that a common complaint amongst sojourners was, “It’s hard to get to know Cubans” in order to form local friendships and really experience local life. She described how she thought that contact between sojourners and Cubans was monitored, but that there were all the kinds of ways of meeting and getting to know people through a network of private teachers who came to sojourners’ houses to give extra lessons to their children. Monique mentioned some of them, such as Mari Tere, who taught piano to her daughter and how she would organise recitals with all of her students for their parents each term. Juan Manuel also came to give Maths lessons. Monique

explained that he was a Physics professor at the university and gave private lessons to earn CUCs in order to supplement his basic income in CUP. Payment, she said, was cash in hand, and that she did not think that it was officially allowed.

For Monique, contact with “real Cubans” gave her a chance to get a closer perspective on Cubans’ views on everyday life and experience the “real Cuba”, in her words. After the lessons, she said, the teachers would stay on for some refreshment and chat about life and politics in Cuba in what she thought was a surprisingly open way, often not holding back on criticising the regime, she said, and how the revolution had lost its way. Monique explained to me that many of these teachers were often academics or musicians trying to improve their daily life through some private work paid in the convertible currency, but who also, in her view, gave the impression that they had fallen from grace at some point and had to resort to this sort of work. She also talked to me about how she thought that the teachers who visited her house were monitored and asked about their visits, because, she said, she could see them in the distance before or after the lesson being stopped and questioned by someone.

5.3.3.3 Leila

“It’s up to you!”

Another form of contact with local Cubans was described to me by Leila, a South American spouse of a businessman from a large foreign company with a contract with the Cuban government to make soft drinks and tinned food. She told me that she had been in Cuba for five years and she explained to me that she had got to know many local *cuentalpropistas* (self-employed workers). From what she described to me, it seemed that there was a wide network of self-employed workers providing educational, artistic, leisure and health and beauty or fitness services to sojourners, often through English and often through home delivery. According to Leila, this included Spanish lessons, yoga or dance sessions, visiting hairdressers, beauticians, masseurs, fitness instructors and such. She described how she regularly visited a physiotherapist, Julio, who helped her with her back problems and who was highly recommended by other sojourners. She explained that, while he worked a lot with sojourners and earned a private income, she said that he always told her about his work on local health projects in small towns outside Havana and organised by the Health ministry. She said that he told her that he provided his services free of charge

to local Cubans, but was also allowed to receive private foreign clients in Havana and that he always paid his taxes.

Leila also told me about her yoga teacher, called Santiago, who, she said, seemed to be “allowed” to work with foreign residents. She said that he was well known and worked a lot with Cubans as part of the official yoga association in Cuba, educating people on the benefits of yoga. She also said that he worked with tourists, but that she was not sure if this was “official” or not. Leila explained to me that she was not sure how official all the other health and beauty visitors were, as, she said, they came to people’s houses and were paid in cash, unlike Julio and Santiago, who received visits in their own houses. However, in her view, contact with the self-employed gave her a way of learning about local life from Cubans themselves. “It’s up to you!” she said, because if people did want contact with Cubans, this was a way to do it. In her view, it allowed her to understand local life better and it was preferable to just socialising with “other expatriates”.

5.3.3.4 Ursula

“They criticise me for breaking ranks”

Ursula was a diplomat from a large embassy, who spoke Spanish and was very keen on getting to know Cubans. She explained to me that her embassy put on welcome social events for newcomers and that these were a chance for colleagues to get to know each other and begin to find common interests. Ursula explained that she thought that work socials were fine at the beginning of a posting and that they could help newcomers enormously with adjusting to their new life, but she said that she was keen to explore Cuban life and understand how people lived. She told me that she was single and that most of her colleagues were married with young families and that they tended to socialise in small family groups from the embassy, separating themselves, according to her, from local life. She said that she was often criticised by her colleagues for not spending enough time with them socially, but that she felt that she did not fit into this pattern of socialising. She explained that she preferred to go out to the numerous bars and discotheques in Havana, where she could meet and dance with Cubans in a relaxed atmosphere. She also described how she had been warned by her manager for not turning up to some embassy social functions and for “contact with locals”, telling her, she said, that it would “affect her career”. “They criticise me for breaking ranks”, she said, but she explained that she disliked what

she called the “expat ghetto” mentality that dominated her work group. She also criticised some of her colleagues for “looking down” on Cubans and their “culture”. However, she also recognised that some sojourners just preferred the familiarity and security of people from the same background, especially as, she reported from conversations she had had, many did not feel very welcome in Cuba and were weary of the constant surveillance. Ursula told me that she recognised that it was a choice that people made, but she also thought that they were missing a lot by not opening up to their surroundings.

5.3.3.5 Joan

“You have contact with people that are allowed to have contact with you”

Joan was a North American living in Cuba, married to a local Cuban artist, called Juan, who I met at an exhibition of Juan’s work at their home. The exhibition was sponsored by the ministry and there were two official representatives overseeing the event. Joan explained to me that her husband was selling his work and that he often travelled to other countries to exhibit, including the United States, she told me. I often met Joan and Juan and other Cuban artists and writers at sojourner social gatherings, where they mingled with diplomats and business sojourners and it seemed to me that they had special privileges. Joan explained to me that Juan was allowed to keep the money he earned, which could be, she said, up to five to ten thousand dollars a painting and that he had a bank account outside Cuba. Of course, she said, all of this was overseen by the ministry and monitored. Joan knew lots of local Cubans and explained to me that there were many local Cubans with special “permission” to have contact with foreign residents. As she put it: “You have contact with people that are allowed to have contact with you”. For her, this meant that she felt that a lot of contact with Cubans was monitored and artificial, though she said that she enjoyed the variety of her social life. However, she also pointed out that she liked to socialise with sojourners, because she had lived in Cuba long time and was involved in Cuban life quite deeply.

5.3.3.6 Analysis: Sociocultural adjustment

These cases describe a number of ways in which expatriate sojourners interacted with others in their environment both in terms of other sojourners and the local population. The accounts are broken down and analysed in the table below and discussed in the commentary section that follows.

	Adjustment issue	Coping strategy	Analysis
A	<u>Monique</u> "It's hard to get to know Cubans"	Talked to Cubans she came in contact with in Spanish (Mari Tere, Juan Manuel)	According to Ward et al (2001), sociocultural adjustment depends on behavioural factors that influence culture learning and social skills acquisition, such as language learning ability, relevant to the new environment. This means that sociocultural adjustment will improve as a result of length of residence and the amount of interaction and identification with host nationals, as well as positive attitudes to the host environment. Monique had been in Cuba for 6 years, had had time to adjust and showed interest in her surroundings.
B	<u>Leila</u> Lack of contact with Cubans	Made an effort to take advantage of local services provided by Cubans and learn about their work (Julio, Santiago)	Leila gained a deep insight into the life of Cuban service providers and the kind of projects they were working on by interacting with them. The official self-employed are described in 2.4.4 and, as a result of the reform process, this body is expanding (see 2.4.8). Contact with host national is seen as crucial for sociocultural adjustment (Searle and Ward, 1990)

C	<p><u>Ursula</u> Getting to know people and adjustment to new life</p>	<ul style="list-style-type: none"> ·Her embassy put on welcome social events for newcomers ·Socialised with Cubans in bars 	<p>Work social events were a natural first step for sojourners and their families to get to know new people, given that the prime purpose of their relocation was usually a new job. Welcome events for colleagues were common and, essentially, social events, involving families and close associates. If social life becomes too enclosed within the sojourner group, this can hinder sociocultural adjustment, although it aids emotional and psychological adjustment (Ward et al, 2001)</p>
D	<p>Ursula felt she could not socialise with her work colleagues as they mainly had young families and were not interested in their surroundings</p>	<ul style="list-style-type: none"> ·She created a separate life outside the embassy where she could meet and dance with Cubans in a relaxed atmosphere 	<p>While work socials were the first introduction for most sojourners into the social life of expatriates, the degree to which they remained an integral part of social life could depend on a number of factors, such as the size of the work group, where sojourners were perhaps more likely to find common ground and where there was a lot of institutional support, or the desire to maintain cultural identity (Berry, 1997) for a variety of reasons, and so on.</p>
E	<p>Her colleagues were closed and</p>	<p>They chose the familiarity and</p>	<p>In the larger embassies, where there were sufficient people to</p>

	not very willing to mix with locals	security of people from the same background	create a fairly self-sufficient community. It was not uncommon for groups to close in on themselves to socialise entirely with each other outside work, with factors such as language, nationality, similar outlook, habits and professional interest being cited as important. It was also common for individuals to show negative attitudes to the local way of life, often resulting in an attitude of superiority and disdain (Tajfel, 1982). Another factor influencing openness to the environment was the level of control and monitoring on certain groups, described in 2..4.10, such as embassies that were either considered non-regime friendly, on the one hand, or may have had few international allies, in general, on the other, which could inhibit wide social networking and encourage close internal social cohesion amongst work colleagues.
F	Ursula was “criticised for breaking ranks” by her colleagues	·She attended work events and was careful what she said	According to Selmer and Luring (2009), the pressure of the in-group may come at a price for those who wish to seek closer contact with the host culture on a social level

			and they describe how “breaking rules” of the in-group can lead to ostracism. Ursula’s colleagues were certainly intimidated by her openness to her environment and sought to bring her into line with the “small culture” (Holliday, 1999) of the workgroup.
G	<u>Joan</u> Contact with Cubans was monitored and sometimes felt artificial	She enjoyed socialising with locals, but also sought out the company of sojourners	There was a fairly vibrant social scene in Havana tolerated by the authorities with better known artists and writers, who were allowed to attend cocktails and dinners and who could sell their works, could travel overseas and even own a car. They were part of the cultural capital of Cuba and considered by the authorities as an example of the success of the revolution. This is referred to by Miguel in 5.2.2.4. Joan was deeply immersed in the sociocultural context of Cuba through her husband’s activity and recognised the risks and restrictions of being involved with the authorities. However, she also liked to step out of this through contact with sojourners from other countries, possibly as a release from this immersion.

H	Degree of sociocultural adjustment	Possible difference in the degree of sociocultural adjustment of different groups	Business sojourners, described in 1.2 tended to adapt socioculturally to some extent due to their long stay, marriage to locals and the need to have extensive networks to improve their quality of life, although a number relocated their business off the island and returned sporadically as non-residents. Diplomats, who stayed for only a few years and who had support from their employer and access to diplomatic consignments, possibly had less incentive to adjust to the local environment.
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Table 5.7 Analysis of sociocultural adjustment

5.3.3.7 Comments on sociocultural adjustment

The cases described in this section outline the type of contact that sojourners had with their local sociocultural environment through contact with host nationals or through membership of their own in-group. According to Social Identity Theory (Tajfel, 1982), group membership constitutes a fundamental part of an individual's identity and how they protect their self-esteem. In a cross-cultural situation, in which differences between expatriate groups and the local society may become accentuated and where adjustment to different cultural norms may be challenging, individuals may be motivated to protect their self-esteem and status through tight knit in-groups that enjoy high levels of trust, interaction, support and rewards and indulge in unfavourable comparisons between their own in-group and the local society. Broadly speaking, there was a contrast between long term sojourners and short term sojourners in their approach to the sociocultural environment. On the one hand, for longer term sojourners, interaction and sociocultural adjustment were perhaps a necessity, or at least more likely, given the length of time that they stayed and the

constraints they experienced on communications with the outside world and on being able to import goods, as described in 2.4. After all, they had to make the most of the local context in order to improve their quality of life. The cases of Monique, Leila and Joan in rows A, B and G, for example, describe the experience of longer term sojourners who sought interaction over time with the local population. In some respects, however, there was a tendency for sojourners to “exoticise” (Holliday et al, 2004) contact with Cubans, who maybe saw contact with them as an opportunity to access a more authentic local experience. Perhaps this, though, was more prominent in the case of shorter term sojourners, such as Ursula, who, after initial social support from her embassy colleagues (row C), actively sought contact with the local population (row D), which was in contrast to many of her colleagues (row E). Exoticisation, as we have seen in 2.5.4, was even more apparent within the tourist industry and popular international media, possibly because contact was more superficial, more fleeting and more contained within a certain context, which allowed it to be monitored and stage-managed by local organisers.

On the other hand, however, according to Ursula’s account, a large proportion of short-term sojourners opted to avoid involvement with local life and, instead, to immerse themselves in the social life of work groups with other sojourners, which, inevitably, gave them a very different experience of Cuba to someone like Ursula. The role and strength of the in-group in some cases, for example, could cause some problems, as indicated by Ursula above (row F), and often led to stereotyping and “otherisation” of Cuban life or “culturism” (Holliday et al, 2004, pp. 23-4). However, as we have seen in section 5.3.2, the process of building social networks within the closer sojourner community probably went a long way to facilitating psychological adjustment, as supported by Ward et al (2001), and it was not uncommon for some groups to have minimal day to day contact with the local population. Overall, non-diplomatic sojourners had close contact with Cubans and shared many of the same challenges over many years, which led to a higher degree of engagement and sociocultural contact with the local environment in a way that many diplomats did not pursue (row H). There were also some indications of how non-diplomatic sojourners dealt with their vulnerability in relation to the authorities, such as avoiding contact with Americans, or accepting that they could not access satellite internet, for example. Also, these sojourners made different choices about their personal trajectory in dealing with anxiety and vulnerability because of the risk of arrest,

expulsion or confiscation of property, as described in 2.4.10. Some stayed to benefit from the business that they did, while others re-located and these choices were about who they had contact with either for self-preservation or for material benefit.

From the point of view of short term sojourners, such as diplomats, however, in some respects, it is perhaps understandable that, in the main, some were not able to, or did not want to, go through a prolonged process of adaptation to the sociocultural context, particularly given the immediate companionship and support provided by work colleagues and the constraints on free interaction with Cubans posed by the authorities. Restrictions on communications, a high degree of surveillance and access to external media sources, described in 2.4.10 may also have served to intensify separation from and rejection of the host society and maintenance of their own cultural identity (Berry, 1997), as they were in Cuba for just a short time. In turn, it was possible that this impeded “culture learning” and sociocultural adjustment (Searle and Ward, 1990) by encouraging a withdrawal from contact with local life and tendency towards “enclavism” amongst small groups (Church, 1982; Selmer and Lauring, 2009). Nevertheless, as in the case of Ursula and her account of her colleagues, there was an element of choice in this and knowledge of the local language was seen to be important. It would seem that individual sojourners had different approaches to interacting with other people in their new environment, depending on what they wanted to achieve during their stay and how much they were able to communicate in Spanish. Some were eager to interact with others and learn about and adjust to the local way of life or expatriate life, while others had less interest in or capability of going beyond familiar habits and routines and made a personal choice about limiting their social contact to what they were used to or familiar with. In any case, as indicated by the experiences of Monique, Leila and Joan, the opportunity was there for all sojourners to get a closer perspective on Cuban life and access local views on such topics as the successes and failures of the revolution, the hardship and frustrations of everyday life and to converse in the local language. Sojourners, thereby, were able to learn more about local norms and values and discuss and contrast their own views and experiences in truly intercultural encounters, which could aid a progressive adjustment process beyond the enclaves of expatriate life.

In terms of the Cubans described in these accounts, while they seemed to provide genuine service, there was possibly also an element of “otherisation” (Holliday et al, 2004) of the foreigner which, according to my observation, could lead to an attitude of opportunism on their part in the interactions that they had with sojourners, as providing services represented a convenient way of obtaining a regular source of income to improve their standard of living. Taking advantage of such opportunities, however, is understandable, given the need to earn a living in the face of harsh local conditions and inequality, described in 2.4.2, but it must also be remembered that having access to foreigners and earning in the convertible currency was a privilege and it was rarely clear how certain individuals were allowed to arrive at this position rather than others. Practitioners such as Julio and Santiago, for example, possibly saw contact with sojourners tolerated by the authorities through what seemed to be a give-and-take arrangement, as they were also active in the local community, but this did not always seem to be the case or was not that apparent. In this sense, social contact between sojourners and Cubans was influenced by the political situation, and the practices of monitoring and control carried out by the Cuban authorities cast an ever-present shadow over the intercultural interactions between sojourners and the local population.

5.4 Summary

In summary, we have seen an outline of the kind of challenges that sojourners face on international assignment in Cuba, some of which have their source within the socio-political context that cradles everyday life and some of which are the result of coping with personal change in, what was for most people, a testing and unfamiliar environment. Likewise, we have also seen an outline of the kind of coping strategies and resources sojourners brought to bear in order to adjust to this new context and the choices that they made in terms of social interaction and engagement with the local setting and population, as well as with each other.

In the following chapter, I turn to a discussion of the key findings to come out of these accounts and discuss the elements of a possible model for “culture shock” and the process of adjustment within international relocation. This will lead to a discussion of the kinds of responsibilities international organisations might have or consider in order to help prepare employees and their families for an international assignments.

Chapter 6. Discussion of Key Findings

6.1 Introduction

In this chapter, I discuss the key findings of the research project in relation to the research questions that set out to explore what challenges sojourners identified in their new environment and how they coped with them. Also, in order to guide international organisations in their re-location policies, I describe a model of expatriate adjustment in a politically sensitive environment such as Cuba, which will inform the final, concluding chapter where I make recommendations about the role that organisations can play in facilitating and supporting adjustment.

6.2 Discussion of key findings

6.2.1 Introduction

This section includes a summary of the key findings of this study, which I explain in relation to other studies and theories and how it advances knowledge of sojourner adjustment in relation to a particular context and more generally.

6.2.2 Types of demands on sojourners

6.2.2.1 Introduction

As described in 3.2.4.5, from the perspective of “stress theory”, cross-cultural adjustment is a response to new and different demands placed upon individuals and families when relocating to a new environment (Aycan, 1997; Haslberger and Brewster, 2008). How they cope with these new demands and whether they see them as challenging or not is an indication of how well they adjust to their new environment (ibid). In Chapter 5, a number of cases were presented of sojourners that had relocated to Cuba and the challenges which they identified were classified into the themes of living with “scarcity”, “control and surveillance”, “inequality” and “personal change in relocation”. In this sense, increased demands can be seen to come from different sources, originating, to some degree, from within the new environment, but also in relation to the changing personal circumstances in relocation. This section discusses the types of demands on sojourners in the context of the study and seeks to explain why they found them challenging and how they affected the adjustment process to Cuba.

6.2.2.3 Environmental demands

Participants in the study identified elements within their new environment that were perceived as different to their background and experiences and which were described as a source of stress in the adjustment process. These are discussed below and the causes and consequences of these demands on sojourner adjustment are then examined in relation to the context and previous research.

Living with scarcity was seen as a challenge by sojourners in Cuba, because it created shortages and affected the consistency, quality and availability of goods and materials for setting up home and daily living. The highly bureaucratic context also created delays in receiving necessities and led to frustration amongst sojourners in not being able to provide a settled home life for their families, as described by Naomi in 5.2.1.2. Furthermore, attempts to fill in the gaps and delays in supply meant sojourners had to revert to the informal economy and cope with the risk of obtaining basic supplies illegally and at greater expense, and the challenge of dealing with persistent suppliers, lack of choice, poor hygiene and the need to scour shops and markets on a daily basis, as described by Maria in 5.2.1.3, Olaf in 5.2.1.4 and Ben in 5.2.1.5. However, engaging with local suppliers also created the opportunity for contact with the host population and was described by Naomi and Maria as a positive experience in many cases, particularly for those that spoke Spanish. Contact also created empathy amongst sojourners for the harshness of daily life for Cubans, in contrast to sojourners, who, in many cases, had to sell off what they owned to access the convertible currency, and the evident inequality in society, as illustrated by the case of Juanma in 5.2.1.4 and as described in the outline of the research context in 2.3.4.5. Nonetheless, there was an ambivalence in the intercultural contact between sojourners and locals, as, on the one hand, suppliers were seen to be opportunistic in their need to access the increased spending power of foreign residents, while, on the other, sojourners could feel guilty about possibly exploiting local people experiencing hardship. The need to provide an adequate and comfortable home life approaching the standards that sojourners were used to, however, was essential to the success of the sojourn and taking advantage of informality was seen as a standard way of living in Cuba.

In contrast to this, the sojourner accounts also point to the way they helped each other by forming collaborative social networks, helping them to share information and

experiences with each other and, as we shall see further down, develop a sense of closeness.

In summary, Figure 6.1 shows the main challenges that scarcity created in daily life from the point of view of sojourners in this study. It also shows some of the psychological effects that they describe in living and dealing with this issue and indicates the nature of intercultural engagement with the local population and other sojourners. All of these factors could affect sojourner morale and ability to cope and I will examine the underlying causes and adjustment process below.

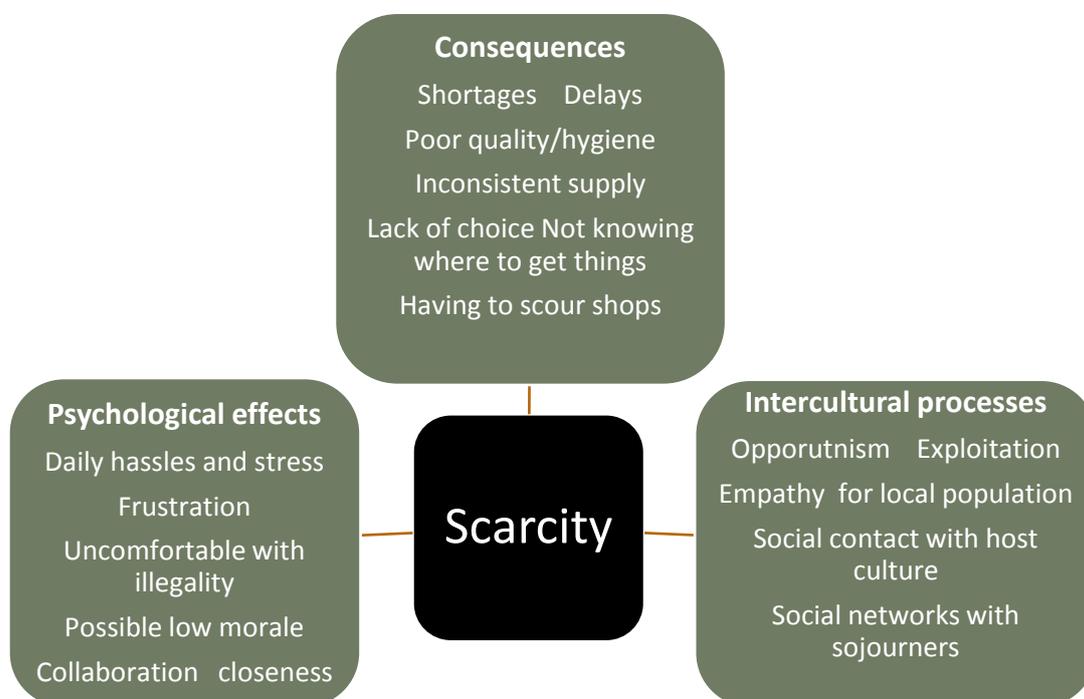


Figure 6.1 The challenges of living with scarcity for sojourners

In dealing with scarcity there was a contrast between the situation of those with diplomatic status and sojourners who had business visas. Those with diplomatic status were able to import goods to some degree and were protected from sanction in obtaining things informally by diplomatic immunity. This was even more apparent in the challenges emerging from the high level of surveillance and control on sojourners, given that business sojourners were vulnerable to arrest and there had been cases of that, although diplomats were also subject to control on their movements within Cuba. Carol, in 5.2.2.2, described restrictions on communications

and information and Pepe, in 5.2.2.3, the difficulties of engaging with the authorities with high levels of ambiguity, politicisation and bureaucracy.

The psychological effects of monitoring were also described as considerable, particularly by Carol, leading to fear, uncertainty and lack of privacy, as well as the need to be careful about self-expression and interaction with certain groups. Furthermore, the tendency towards segregation of foreign residents by the Cuban authorities, in order to maintain this level of monitoring, had particular consequences for intercultural communication, as sojourners engagement with authority became complex and alienating. We shall see the implications of monitoring for sociocultural adjustment later on, but the main effect of surveillance and control on adjustment were psychological and the effect of this is summarised in Figure 6.2.

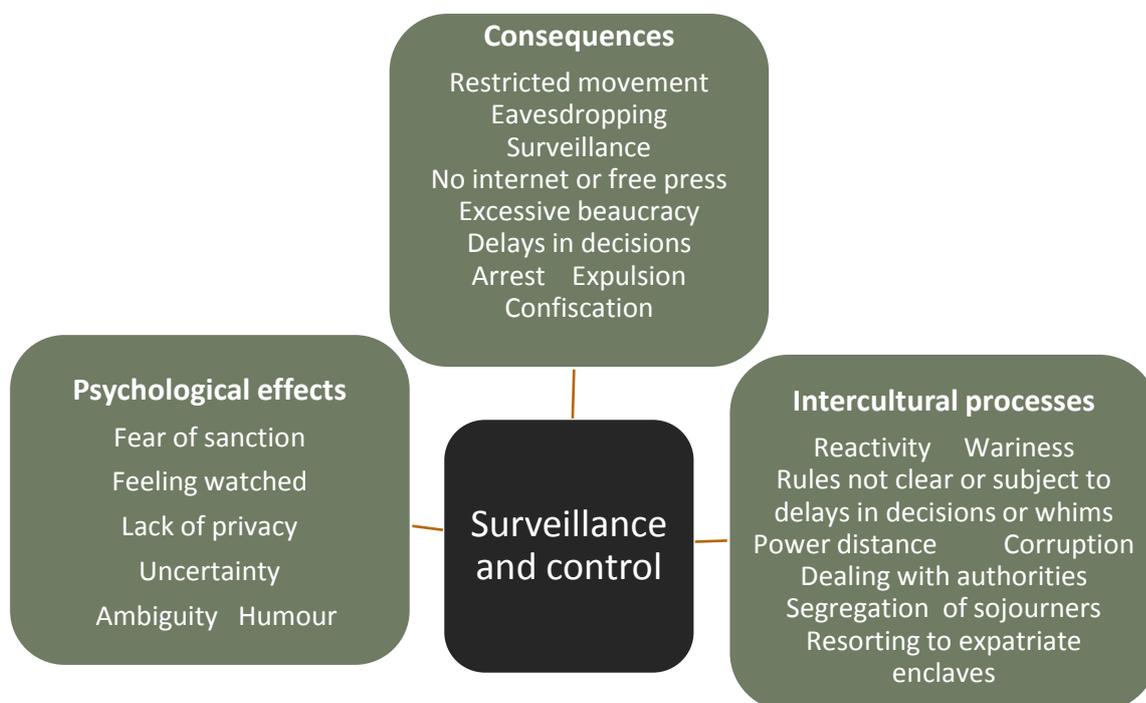


Figure 6.2 The challenges of living with surveillance and control for sojourners

Again, this illustrates some of the reported consequences of monitoring by sojourners, the psychological effects of this on them and the impact on the relationship between sojourners and the local population and the authorities.

Another challenging area for sojourners was the need to live with inequality, although it only had an indirect impact on the quality of life as it was a phenomenon within

Cuban society. While inequality is fairly ubiquitous throughout the world, in this context sojourners were drawn in to engage directly with Cubans who evidently had less access and fewer means than themselves and many expressed feelings of regret at playing a part in this inequality or having to stand by and see how some were treated better than others, which had an impact on their own experience of adjustment. On the one hand, as we have seen from the accounts in section 5.2.3, contact with the local population could be an enriching experience, particularly for those that spoke Spanish, allowing sojourners to explore people’s experiences and views of life first hand, as Kim and Amy describe in 5.2.3.1 and 5.2.3.3. On the other hand, it brought sojourners more into contact with the consequences of growing inequality and illegality in Cuban society, which the political reform process sought to address, as described in 2.3.4. This increased the uncertainty of everyday life for sojourners and could be alienating, particularly for those who had negative experiences, such as Manuel in 5.2.3.5. As a response to this, as we shall see in section 6.2.3.5 on sociocultural adjustment some sojourners retreated into “expatriate enclaves” (Lauring and Selmer, 2009), and largely avoided engaging in contact with local life or interacting with the local population. The consequences of living with inequality and the impact on sojourners’ state of mind and intercultural engagement is summarised in Figure 6.3 below.

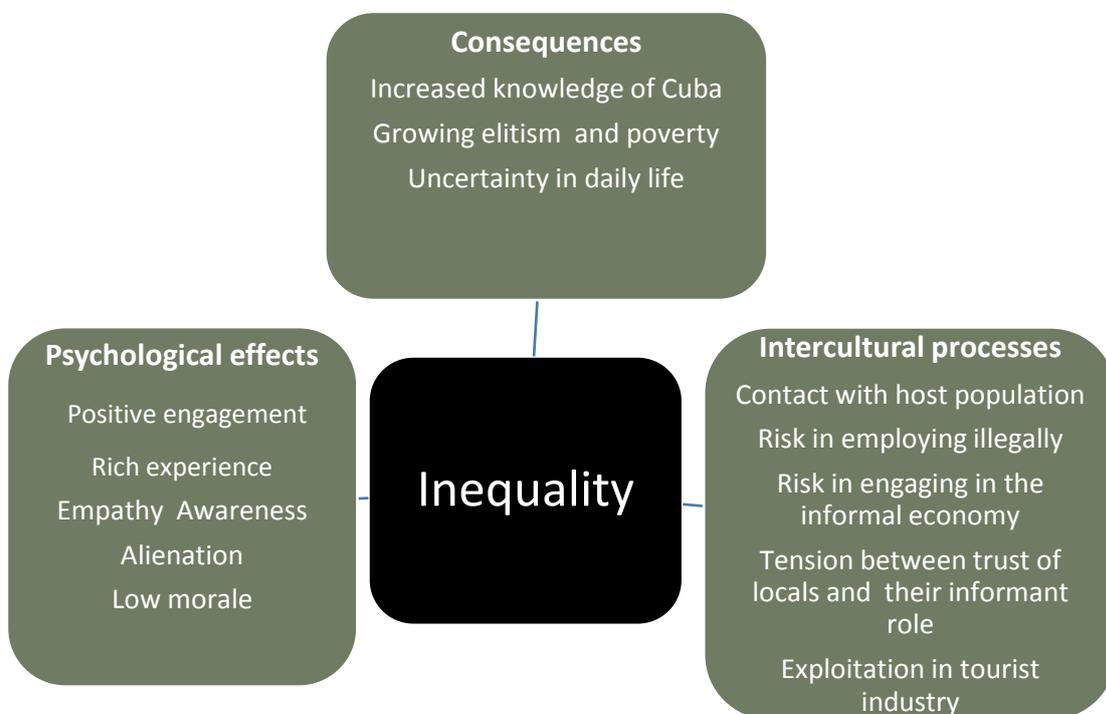


Figure 6.3 *The challenges of living with inequality for sojourners*

Inequality in living conditions could draw sojourners in to contact with the local population through the informal economy, within the work environment and through tourism, although the short-term tourist experience of Cuba and the perspectives evident in travel journalism and the tourist gaze outlined in 2.4 came from a different perspective to those sojourners who were settled in Cuba for several years.

Overall, then, we can see how sojourner life can become increasingly intertwined with local life and how sojourners increasingly have to deal with demands placed upon them by the local environment. Referring back to the description of the context of this study in Chapter 2, we can see how some of the challenges that sojourners outlined in the accounts in Chapter 5 have their origin in the environment and the new demands placed on sojourners in relocation to Cuba. These can come from a number of different sources and they are summarised in figure 6.4 below.



Figure 6.4 Sources of environmental demands for sojourners

While some challenges can come directly from having to deal with aspects of the physical environment, such as the local climate, pollution, disease or climatic events, such as tropical storms or hurricanes, but also infrastructure, such as transport systems or accommodation, there is also a behavioural environment that surrounds the physical space and which influences its evolution (Duranti and Goodwin, 1992). In this sense, we can identify a more complex set of “aspects of cultural reality” (Holliday, 2011, p.131) and extra-situational factors that underpin the context and daily life of Cuba. Thus, we can identify particular global or geo-political macro processes, or forces, that influence everyday life in Cuba. We have seen how scarcity, for example, is heavily conditioned by Cuba’s international position and its relations with certain countries, which exercise an embargo and diplomatic pressure in order to bring about political and social change.

Likewise, we can also identify elements within the framework of decision-making within Cuba itself, which result in a particular social order and economic policy within the sociocultural products and processes in Cuban society. This entails the wider institutional organisation of society, but also the informal responses on a micro level to the way individuals and groups resolve everyday issues at the “small culture” level (Holliday, 2011). Within this we can identify elements of the Cuban government’s formal economic policy, for example, such as the operation of a centrally planned economy, or the use of a dual currency, described in 2.2. But, we can also identify the emergence of an informal economy as a sociocultural response to the scarcity created, in part, by geo-political forces and, in part, by government policy, together with the resulting growth of inequality as a result of different levels of access to resources. Similarly, we can also identify a formal framework of social control and order, though institutions of law and order, the CDR (neighbourhood watch), policies in education, press censorship and so on. But, we can also see the informal sociocultural processes that emerge in the form of the blogosphere or daily monitoring of activity by the authorities. Sojourner life, as we have seen, becomes intertwined with this, but there are particular aspects of sociocultural processes that become prominent and that can affect the adjustment process. For instance, the challenges of dealing with social control and monitoring by the authorities, mentioned by Carol in 5.2.2.2, and the resulting risk and stress factors, or dealing with suppliers involved in the informal economy and the psychological aspects of opportunism, exploitation and inequality have all been described by other sojourners in 5.2. As well

as this, however, we have also mentioned the positive aspects of daily sociocultural contact between Cubans and sojourners and social networking amongst sojourners that respond to and surround the performance or “theatre” of daily life (Goffman, 1969). In addition to these tangible aspects of the context of Cuba, however, as mentioned in 2.4, we must add the role of ideology and discourse as a strong influence on the perception of actual life from different perspectives or worldviews. This is particularly crucial in understanding sojourner life in Cuba, because of the restrictions on information and communication exercised by the Cuban government, described throughout Chapter 2 and the impact that this has on daily life. As we have seen, Cuba can be described as a “politically sensitive location” (Bell, 2013) and the stress placed on sojourners through surveillance and control, as outlined throughout Chapters 2 and 5, is not insignificant and has culminated in a number of detentions and charges against sojourners with limited recourse to legal counsel, as indicated previously (BBC, 2011, August 5; Reuters, 2013, May 23). Furthermore, as described in 2.4 on different perspectives on Cuba, the framework of myth and ideology in its dominant discourse (Baumann, 1996), constructed through official media and policy in justifying its persistent limitations on freedom of expression (Aguirre, 2002), coupled with the particular forms of the “tourist gaze” (Urry, 2002) and “travel journalism” (Hanusch and Fürsich, 2014) that pervade the Cuban tourist industry create a perspective of Cuba that can mask or misrepresent many of the challenging aspects and processes of sociocultural and political life that influence the quality of life of local residents and the consequent adjustment of sojourners. Within this panorama of discourses there are also alternative worldviews, presented through international comment and publications and resident international or independent journalists, and expressed through the demotic discourse (Baumann, 1996) and the alternative, illegal blogosphere, specifically directed at presenting everyday life “from a point of view distinct from that of the Cuban government” (*Desde Cuba*, available at <http://www.desdecuba.com/>), all of which allow alternative interpretations of life in Cuba.

Thus, demands on sojourners can have their origin in the environment which can create challenges in the adjustment process. These can be defined as elements within the new environment that are perceived by individuals as different to their background and experiences and which can be a source of stress in the adjustment process. How sojourners respond and cope with those elements particular to Cuba,

as described above, defines how well they adjust to life on the island and this will be discussed in section 6.2.3.

6.2.2.4 Lifestyle demands

The other major source of increased demand and stress came from sojourners' changing circumstances and the new lifestyle that they adopted in their new location. In most cases, individuals were taking on a new role which they had to adjust to, whether it was a new job, going to a new school or perhaps changing or giving up a career. The case of Elke in 5.2.4.2, for example, describes how she had given up work in order to relocate and her change in role to a "trailing spouse" (Harvey, 1985) created feelings of uncertainty and vulnerability and a lack of purpose. The affective consequences related to the change in role, such as lack of confidence and self-esteem, exacerbated by the challenging living conditions of Cuba, influenced her adjustment to her new environment.

Also, relocation could also mean that sojourners needed to take on new responsibilities or roles in different aspects of their lives in order to cope with and adjust to changes in their environment. Paola, in 5.2.4.3, for example, mentions both the difficulty that her daughter had in adjusting to her new school and her own difficulty in taking on more responsibility and stress in the new location, not only as a result of changes to her own lifestyle, but also as a result of spillover from aspects of her family members' new lives and crossover from how they were adjusting to the demands of their new roles (Harvey, 1995, Haslberger and Brewster, 2008). Furthermore, the initial stages of relocation tend to be intensely focused on coping with adjusting to the physical environment, while losing familiar support and social networks at a time when they were possibly most needed to help cope with change. Paola mentions the loss of support and friendship networks, which Eva also highlights in 5.2.4.3, resulting in feelings of isolation, as familiar avenues of socialising and relaxation were no longer available. In this sense, forming new ties and social networks of different sorts becomes an important aspect in adjustment (Granovetter, 1973; Krackhardt, 1992), although the particular nature of Cuba and the restrictions on communications and freedom of movement were particular complicating factors in the case of Eva.

In summary, adjustment problems can also be a result of new lifestyle demands, defined here as changes in an individual's personal or professional situation as a result of relocation, which can be a source of stress in the adjustment process (Ward et al, 2001). Figure 6.5 summarises the main changes in role and lifestyle demands observed in the study. This shows how new lifestyle demands can come from a number of sources, which are not context related, but are the result of re-location and pose challenges for sojourners.

In essence, these are changes in an individual's personal or professional situation as a result of relocation which can be a source of stress in the adjustment process. Moving from the bottom right hand corner of figure 6.5 in an anti-clockwise direction, these challenges can be described as follows:

1. Loss of support networks: These are the normal supportive relationships that individuals build up over time in a location to cope with everyday challenges, whether as part of family structure or a network of friendship ties. The loss of these vital relationships in such a challenging day to day environment, coupled with the difficulty in communicating beyond Cuba and the need for Spanish for local communication, created challenges in adjusting to an unfamiliar environment.

2. Loss of social and professional networks: These are the social relationships created through work for professional and recreational ends and a source of varied companionship and professional confidence. Moving to Havana and giving up work meant that these were essentially lost, creating an increased dependency on a reduced network of people and the loss of opportunities to socialise and self-actualise through work. While this is an obvious consequence of relocation, in general, in the context of Havana it proved more challenging for non-working sojourners until they could build up alternative networks.

3. Adjustment to a new role: A new lifestyle can result in changes to the way an individual structures their life and duties, maybe spending more time travelling for work, or more time with the family at home or having to spend more time on homemaking duties, particularly at the beginning of a sojourn. In this respect, the adjustment process can be more acute and complex for the non-working spouse (Tung, 1981; Harvey, 1985), which can lead to increased stress (Adelman, 1988).

4. Affective factors in re-location: Some or all of the above factors combined could produce a negative affective response in sojourners, particularly spouses, who had to cope with social living adjustment (Black and Gregerson, 1991) and provide support for family members through crossover and spillover (Haselberger and Brewster, 2008). At the same time, loss of friendships, giving up work and being unable to easily access support from a distance could produce feelings of isolation, loneliness, loss of self-esteem, depression and so on, which were reported by sojourners in the study.

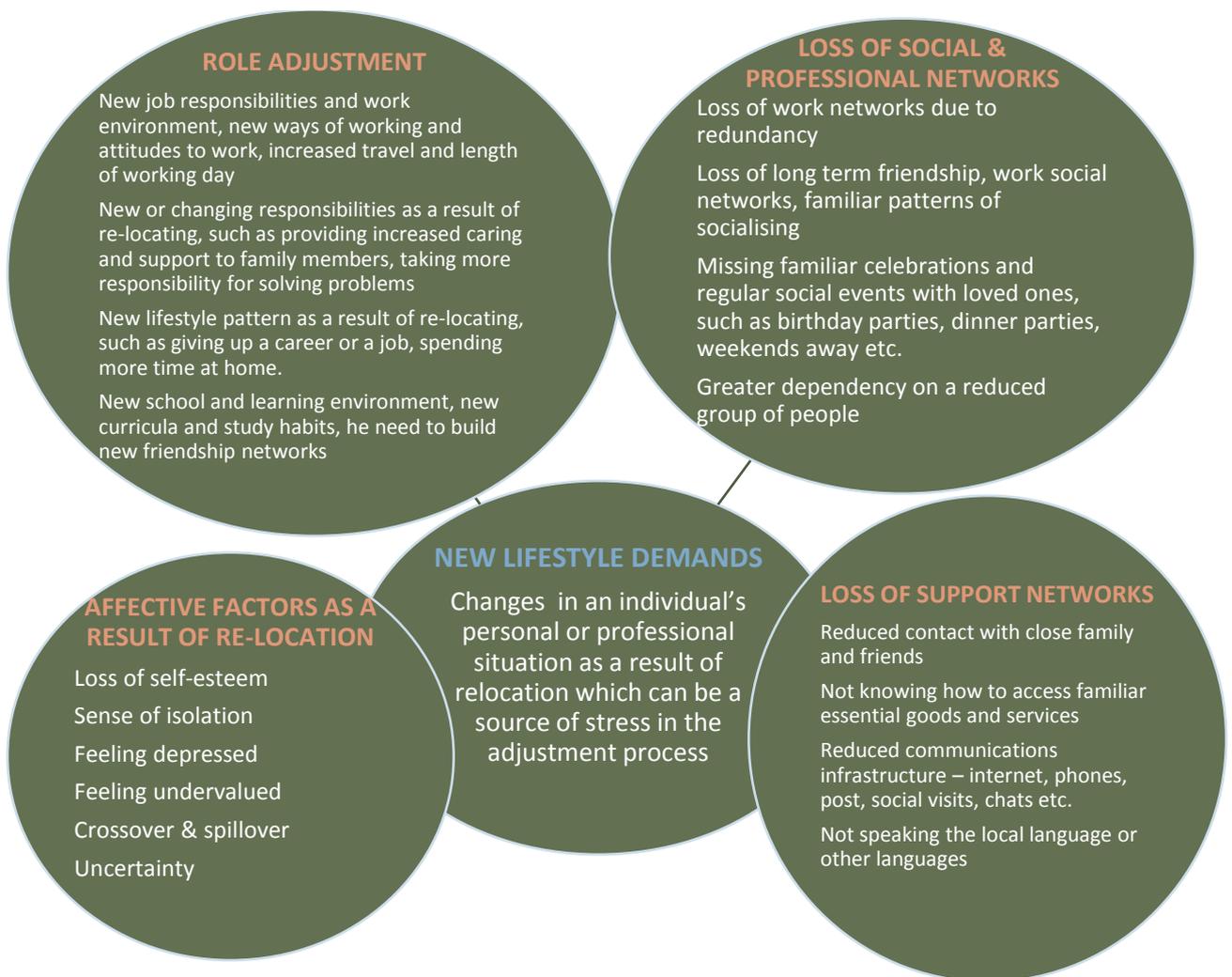


Figure 6.5 Lifestyle changes for sojourners

These can be as a result of changing roles due to relocation, the loss of particular networks or psychological or affective factors. The nature of Cuba as a context for relocation, however, created a number of particular challenges and opportunities for

sojourners experiencing lifestyle changes and I discuss how they responded in section 6.2.5.

6.2.2.5 Summary

In summary, then, sojourners experienced a wide range of challenges to their personal circumstances in their relocation as a result of experiencing a new way of life. As we have seen, the source of demands and stressors on expatriates relocating can overwhelmingly be described as “environmental”, and are related to the particular nature of the Cuban context, which sojourners encounter and have to adjust to. However, challenges can also be as a result of a changing lifestyle and responsibilities in relocation, which are not related to the context, but, as we have seen, can be influenced by the particular nature of the new location. Cuba, as a politically sensitive location, intensifies these demands, and restricts communications and the availability of resources.

6.2.3 The adjustment process

6.2.3.1 Introduction

As we have seen, the increased level of demands involved in relocating to Havana meant that individuals had to make adjustments in order to settle in their new environment and gain a sense of stable well-being after relocation. The study showed that there were different challenges for individuals in different domains of daily life, whether at work or in another area of life or depending on the new role that they had to fulfil. As a response to changes in their lifestyle, sojourners made adjustments on both psychological and sociocultural levels. That is to say, on the one hand, they found ways of coping with stress and obstacles in order to establish a daily routine, while, on the other, they adjusted to the social and cultural aspects of their new context. How well individuals coped with this process of adjustment differed, however, and depended on a range of factors. I now describe this process of adjustment based upon comments and reflections by the sojourners themselves in relation to how they coped and adapted to the challenges of their new way of life.

6.2.3.2 Personal resources in adjustment

Sojourners in the study mentioned a number of personal or individual factors that they believed influenced how they and others adjusted to the new environment. Factors ranged from intrinsic personal or cognitive qualities, such as an outgoing

personality, as in the case of Ricardo, in 5.3.1.4, who also alludes to other qualities, such as tolerance of difference and positive attitudes to change, and to ways of behaving, such as showing cultural sensitivity to different ways of life or proactively building networks and meeting a wide range of people, all of which have been cited in research as being important for an individual to cope with adjustment to a new environment (Parker and McEvoy, 1993; Aycan 1997). Another category of factors were those that came from particular individual skills and experience related to the relocation process, such as the ability to learn languages or to learn about other ways of life, as in the case of Marc and his wife, in 5.3.1.3, who received limited support from their employer and had to rely on their own experience and resources. Previous experience of Latin America was also mentioned by Marta, in 5.3.1.5, as well as being able to speak Spanish, and these were personal resources for her to be able to resolve problems with little support. Finally, an individual's personal means and circumstances were seen as influential, as in the case of Carlos and his wife, described in 5.3.1.6, who both worked and could afford a luxury flat with associated amenities. For example, some individuals may not be able to afford a car in order to be able to move around freely, or may not have had the internet or a mobile phone in order to be able to communicate and build networks, as Carlos and his wife could. In Carlos's case, he could afford to take positive steps to securing a comfortable lifestyle, which made adjustment that much easier.

Some of this reflects recent research into individual success factors in adjusting to unfamiliar environments, but more specific research would be required to see if it was possible to demonstrate their influence on adjustment in this or other contexts. Furthermore, while recent research goes some way to suggesting evidence for a wide range of individual characteristics that might influence an individual's sense of well-being and comfort in an unfamiliar environment, including maturity, previous experience, specific cultural and communication skills or personality traits, expectations, cultural training and so on, robust conclusions are few and far between (Ward et al, 2001). However, in line with some studies many of the approaches taken by individuals, summarised in Figure 6.6 below, indicate a pro-active use of strategies by individuals to create a sense of mastery over and make sense of the environment in order to reduce uncertainty (Adelman, 1988). These strategies are defined here as personal or individual qualities, traits or factors that enable an

individual to adjust to an unfamiliar environment more easily than others. Moving from the left hand side of figure 6.6, they can be grouped as follows:

1. Personal or cognitive traits: These relate to attitudes, personality traits and beliefs about how to behave in a new context, which can enable a person to deal with unfamiliar or ambiguous elements and exercise tolerance towards difference, or openness to engaging with people from a different background.
2. Skills and experience: This group relates to the various skills and experience brought by individuals to relocation, such as knowledge of languages, familiarity of the adjustment process and understanding what to expect at each stage.



Figure 6.6 Personal resources in adjustment

3. Positive behaviours: Particular positive behaviours can be identified in what sojourners do to cope with adjustment, including showing cultural sensitivity, being sociable and making efforts to build networks in the process of adjusting to a new environment and settling in to sojourner life.

4. Personal means and circumstances: These factors can influence adjustment, because they can influence choice and provide access to solutions to problems. The high cost of living, influenced by the informal economy, and the means to overcome shortages by gaining access to resources, made life easier for sojourners and, thereby, facilitated adjustment.

In summary, these were factors that sojourners indicated as being influential in adjustment in their own experience and which they perceived as enhancing their ability to cope with and adjust to increased demands. Overall, then, we can say that some individuals in this study were observed to be pro-active in trying to cope with adjustment by using their own personal resources and would frequently reflect on how they responded to new demands and circumstances through their own means.

6.2.3.3 Social and institutional support

Support from others, whether from individuals or from organisations, in their relocation experience was a key theme amongst sojourners when describing adjustment and this could come from a variety of sources. In the first instance, an individual's work organisation had a role to play in settling the employee and his or her family into the new environment, both in a physical sense of ensuring they were installed in appropriate and comfortable accommodation, had all their belongings safely delivered, had obtained all the necessary authorisations to settle in the host country and in terms of morale and well-being. This is key to the success of the sojourn for both the employer and the employee. Irina, in 5.3.1.2, describes the kind of tangible assistance that she got from her employer, ranging from a personalised guided tour of where to find things in the environment and help settling into accommodation, to more sustained help with house maintenance and bureaucracy. Ricardo, too, talked about the help that he had, which enabled him and his family to settle quickly and get a lot out of their sojourn. In a subsequent section of Chapter 5, in 5.3.3.4, Ursula talks about the active role her organisation played in organising welcome socials, which enabled newcomers to meet other co-workers and establish

ties. In contrast, in the cases of Marc and Marta, as pointed out earlier, they had to rely on their own resources, but had the skills and experience to do so.

The amount of resources put into support by international organisations in Havana varied considerably, as Irina and Ricardo recognised, and this influenced how sojourners talked about their experiences in the adjustment process. The amount of support given tended to relate a lot to the size of the organisation and the number of expatriate employees that needed support. Larger embassies, such as the US, Canada and major embassies for Europe, Africa and Asia had a lot of resources at their disposal and invested in social support for their employees. In other cases, such as Marta's, sojourners had no local sponsor and had little formal resource to call upon and this meant that it could take several months to settle. Having the back up and ongoing help and support from work was an important benefit when trying to adjust, allaying the frustrations of coping with a difficult environment and facilitating a sense of physical and psychological well-being in new surroundings.

An interesting point that Ricardo made, however, and which I will pick up later on when discussing building networks and sociocultural adjustment, was that, in his view, a high level of support actually inhibited some of his colleagues from interacting with the local population. This, again, is in contrast to Marc and Marta, who were forced to interact with the local population in order to resolve adjustment issues. In this sense, then, the incentive to interact with the sociocultural environment is reduced by institutional support and could lead to "ghettoism" (Church, 1982; Aycan, 1997) or "enclosed enclaves" (Lauring and Selmer, 2009), where large groups of well-supported expatriates work and socialise together and ignore their cultural surroundings.

Apart from an individual's work organisation, the international schools, described in 2.5.4.4, played an important role in welcoming and settling sojourners into expatriate life, organising events to welcome newcomers, provided information and a forum to discuss issues and, above all, provided the opportunity for networking and getting to know other people. The specific role of one of the schools and how it helped with adjustment is described by Juana in 5.3.3.2. Her school was particularly important in helping families settle, as they sought to help children adapt to a new curriculum or language and make friends through a "buddy" network. Sports clubs, too, often set

up team events and leagues in leisure time, while religious groups were a source of common interest for people, all of which enabled sojourners to meet people, pursue a pastime and socialise.

As well as this, there were numerous individual or small group initiatives that brought people together with a particular interest in order to socialise or get the most out of their new environment. Some examples are given in a later section on building networks by Afrina, in 5.3.2.5, and included cultural visits, choir and music groups, social gatherings at the weekend and so on, all of which helped sojourners settle, but also helped them adapt to their new environment and enjoy their stay a lot more as time went on.

Thus, while the role of the employer is paramount, as we have seen, sojourners in Havana in this study also turned to the schools and other less formal groups in the process of adjustment. Figure 6.7 summarises all of these support groups as forms of institutional or social support, defined as organised groups and services dedicated to meeting the specific social and living needs of sojourners and supporting them in the adjustment process, whether on a formal or informal basis. Starting from the box at the top and moving in a clockwise direction, these groups can be outlined in the following way:

1. Support from employers: Examples of how employers can help in this context are numerous, ranging from the provision of information in the form of welcome packs, helping with bureaucracy and arranging social events for newcomers at the beginning of the stay, to ongoing support in setting up and maintaining accommodation and enabling access to goods through importation. Also, providing adequate terms and conditions for relocation in the form of remuneration packages and allowing for training and support for families could all influence the adjustment process.

2. Support from international schools: The support role that international schools played in welcoming and helping to settle sojourners was seen to be significant in this study. Activities ranged from specific help in adapting to the school system, to a wide range of social events and to providing space for informal and impromptu

gatherings at the school gates, which could lead to wider network building in the adjustment process.

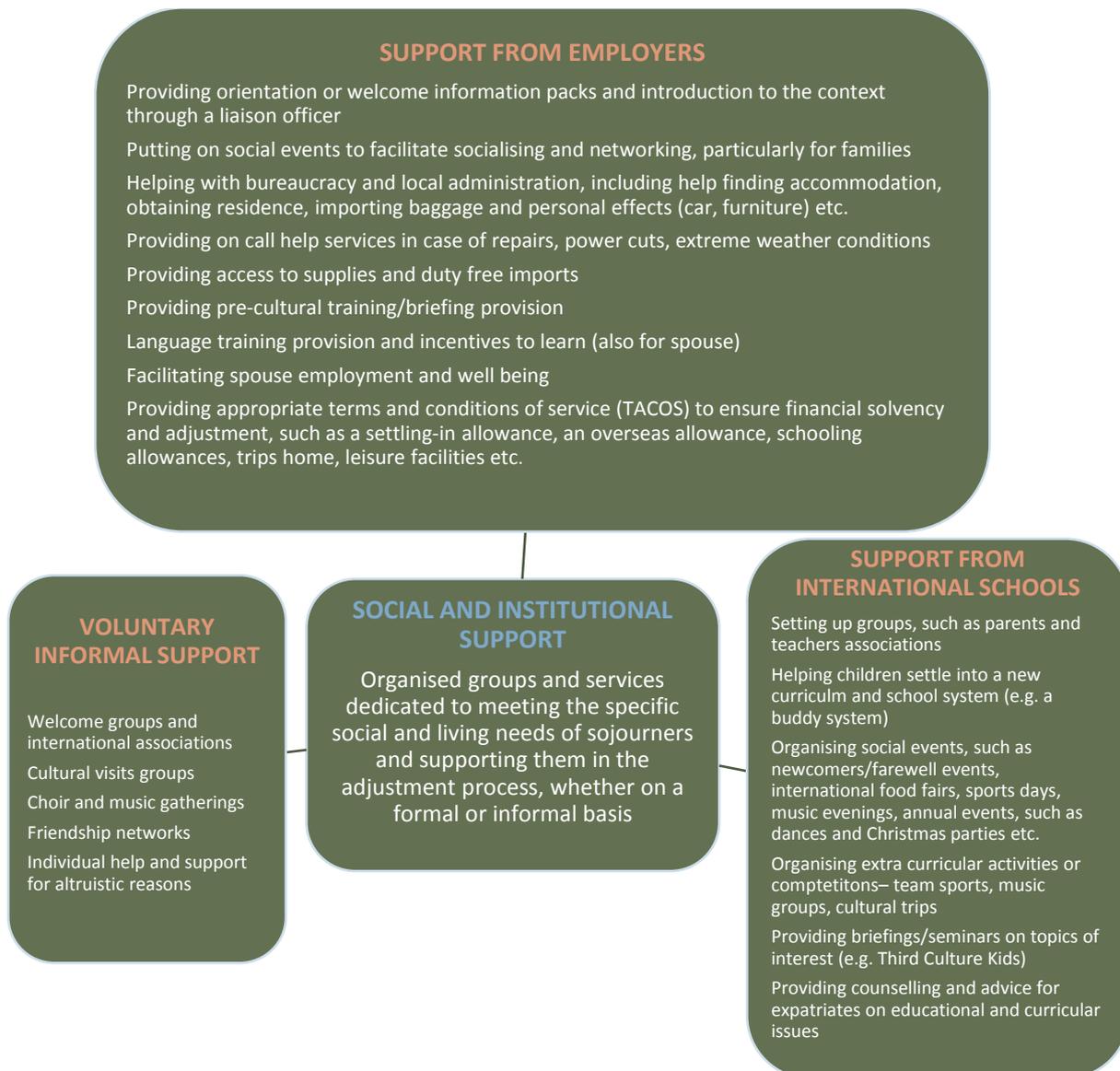


Figure 6.7 Forms of institutional and social support for sojourners

3. Voluntary informal support: In this study, there were also examples of how sojourners promoted social contact through specific activity groups, focusing on such areas as cultural activities or just providing a helping hand to newcomers to help them settle or get to know other people in a similar situation.

In summary, the findings in this study outlined here enhance recent research on the role that social support plays in alleviating problems through the right support mechanisms, which can impact positively on both the psychological and sociocultural level and alleviate loneliness, stress and depression (Searle and Ward, 1990; Ong

and Ward, 2005). Also, as this study supports research that identifies factors beyond the workplace and the challenges faced by spouses and families in adjusting to a new way of life as having an increasingly significant influence on success at work and overall adjustment (Hechanova et al, 2003). An overseas assignment can lead to disruption of established social support networks, as we have seen in lifestyle changes in 6.2.2.4, as well as the challenge of having to develop new ones. Such changes can be especially stressful in particular for accompanying spouses, who may have to take on additional family responsibilities, may feel more isolated and constrained and, at the same time, deal with changes in their social or work status (Copeland and Norellc, 2002). Another key issue is the role and responsibility of employing organisations in providing social support not only to the employee but to the spouse and family, as some studies suggest that an executive's spouse and family often play a key role in the success of an overseas assignment and that there is a clear spillover effect between work and family life (Tung, 1981; Harvey, 1985).

Overall, then, an important factor cited by sojourners regarding their adjustment was the help and support of others. This provided psychological support, on the one hand, enabling sojourners to cope and settle, but, on the other, it also enabled them to get the most out of their time in Cuba and adapt to the sociocultural environment. While personal resources relate to how individuals can or need to find a response from within themselves or their own personal relationships to cope with a new challenge, either through a personal quality, ability or experience or the help of a close family member, institutional resources or social support are those sought beyond the individual from an organisation, mainly an employer. The kind of resources that can make a difference to the adjustment process can range from simple information provision, through tangible support or a regular service or allowance, to activities that can make a real difference to a person's psychological well-being and sociocultural experience in the new location. I now examine in more depth how this sociocultural experience can develop.

6.2.3.4 Social networks

The importance of social contact and networks is a key theme in this project, as with all social settings, but adjusting to Cuba created challenges that required sojourners to collaborate closely in adjustment. This was sometimes for practical reasons, as indicated, for example, by Naomi and Maria in section 5.2.1, when dealing with

scarcity, or for emotional reasons, when dealing with lifestyle change, as indicated by Elke and Eva in 5.2.4. This section looks at networks in more detail and the role that they played in adjustment.

As mentioned above, Juana describes, in 5.3.3.2, how she had little support from her organisation and focused on her children's school in order to make contacts and build a friendship network, which helped her overcome the restrictions on communications exercised by the authorities. The school also provided wider networking opportunities, which enabled her to access information and settle into her new life. In this sense, school social events and projects helped her create ties quickly with other people as part of an open network, which could also develop into stronger ties through friendship. Valentina, in 5.3.3.3, describes how strong these ties became in times of crises, which provided psychological support in the absence of extended support networks from sojourners' home country, as Krackhardt (1992) indicates, while for Jaime, in 5.3.3.4, it was more important to create multiple bridging relationships for a wide collaborative network of weaker ties for mutual benefit (Granovetter, 1973). Afrina, on the other hand, in 5.3.3.5, describes how she was able to socialise and deal with loneliness whilst remaining within quite a closed gender-specific membership network restricted to a specific religion and nationalities ("Asian women").

In order to explore the significance of these networks and groups in this study for the adjustment process, they are depicted in Figure 6.8 which indicates a broad landscape of possible networks and groups. The size of the group or wider network was related to its function, density and strength and they can be broadly categorised in two ways:

1. Small networks: Small networks tended to be closed groups where strong ties developed and which aided psychological adjustment as explained through a stress and coping framework (Searle and Ward, 1990). These networks had specific functions, as we have seen, focusing on nationality, gender or a specific activity, which tied the members closely together and could be exclusive to ensure tight-knit bonding and support.

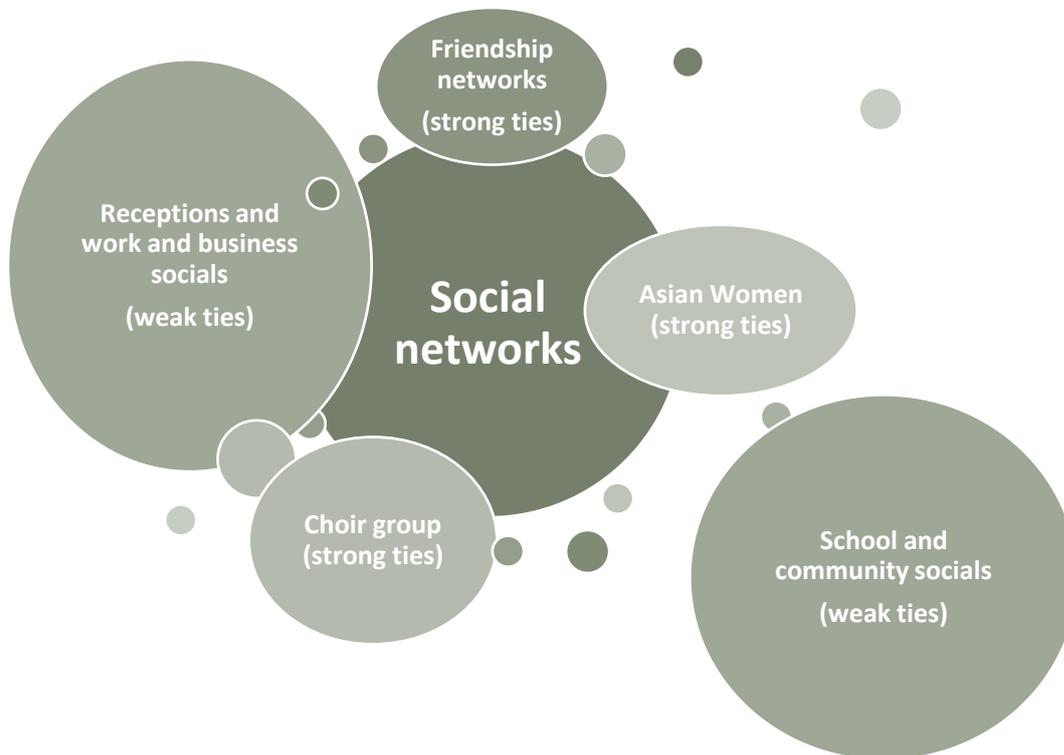


Figure 6.8 Examples of building social networks for strong and weak ties

2. Large networks: The larger networks were more open with weaker ties, essentially allowing for collaboration, information exchange and knowledge sharing amongst sojourners. While networks and groups that provided strong ties tended to predominate, these wider networks served to help sojourners cope with the practical challenges generated by some of the environmental demands of Cuba, described in 5.2, which created difficult living conditions and a tendency towards segregation.

In summary, while sojourner networks contributed to psychological adjustment, for the development of a wider sociocultural learning model, it is necessary to look at interaction between sojourners and the host population (Searle and Ward, 1990). Viewing adjustment from the point of view of sojourner network building is limited, for, as we shall see further, not all sojourners in this study chose to remain within closed groups and limit contact with the local population.

6.2.3.5 Sociocultural adjustment

In the previous section, I described how sojourners built networks amongst themselves to improve their quality of life, both materially and psychologically, from quite early on in their sojourn, through events and ties established at welcome events at work and school. For some sojourners, particularly those on short term

assignments and those that could benefit from the wider networks of a large embassy or company or take advantage of spillover from work to social life, this was sufficient to establish a certain level of companionship and support, as described by Juana, Valentina and Afrina in 5.3.2. However, it was also true that some sojourners were more motivated or constrained to build networks than others, if, as we have seen in 6.2.3.3, the level of institutional resources and support at their disposal was limited.

For other sojourners, such as Ursula in 5.3.3.4, this was not sufficient, and she sought a deeper involvement in local Cuban life. In the opinions of Monique and Leila, in earlier sections, this was a matter of choice and they both gave examples of how they had regular contact with locals and learnt more about Cuban history and everyday life. The level of choice can be seen from the concept of “acculturation strategies” (Berry, 1997) in which migrant individuals and groups define their level of involvement with the host society in relation to their relationship to other groups within society and their own need to maintain what they perceive as their cultural identity. Figure 6.9 is an adaptation of this model and describes the level to which sojourners rely on social networks and to what extent they wish to become involved in local life. Quadrant B, for example, describes a sojourner such as Juana, in 5.3.3.2, who lacks institutional support, because her work organisation is small, relies upon the social networks built mainly around the school and does not seek, or has not had the time to develop, contact with the local population. In this sense, she is part of a sojourner group that seeks to maintain their identity, but also seeks ties in order to respond to environmental demands and obtain psychological support. In quadrant A, the sojourners are likely to be part of a large organisation that provides substantial social support and opportunities for socialising with colleagues, thus decreasing the incentive to develop networks with other sojourners. In this sense, individuals in this quadrant are more likely to socialise amongst colleagues of the same nationality or worldview, reiterating a strong cultural identity and possibly rejecting the local environment. Ursula makes reference to this when she was critical of her colleagues’ attitudes towards Cuban life and society and tendency to stay within a sojourner enclave, or “expat ghetto”, in her terms. Furthermore, the isolated and closed nature of this group also created problems of conformity and collegiality for Ursula, which Marc had also alluded to in 5.3.1.3, where issues of status and identity protection dominate social interaction within a tight-knit group (Tajfel, 1982).

It must be remembered, however, that the political sensitivity of the location did not encourage involvement in local life, because of the high degree of monitoring and segregational tendencies of the context, and that integration is also dependent on the policy of the host society towards cultural diversity and its openness towards accommodating alternative worldviews and habits (Berry, 2005), as discussed in 3.3.1.

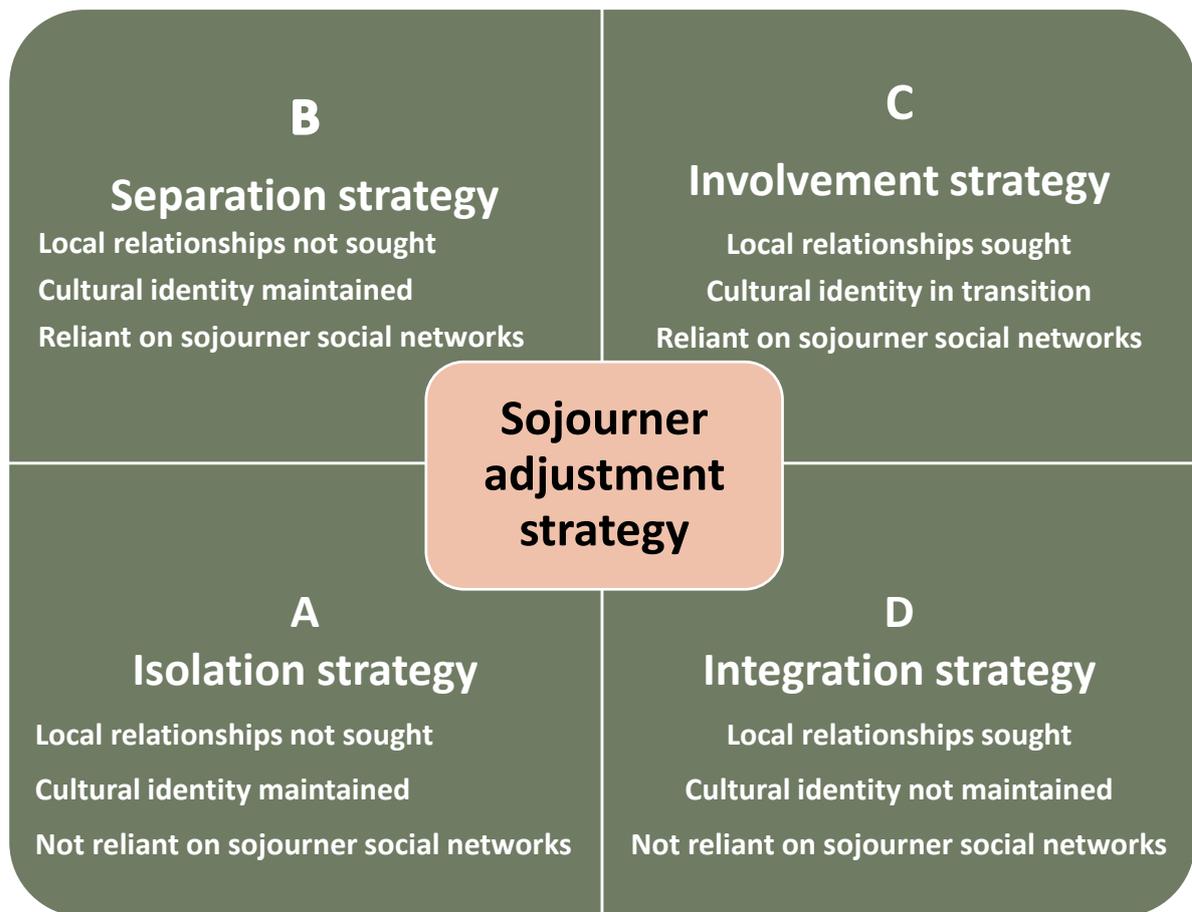


Figure 6.9 Sociocultural adjustment strategy in sojourners

Quadrant C represents individuals or groups that make the explicit choice to widen their social networks beyond the sojourner community and become more involved in Cuban life, as described by Monique and Leila in 5.3.3. This gives them a richer involvement and experience of local life, in most cases built up over time leading to an evolving cultural identity also influenced by the local context. It is interesting to note that both of them had been in Cuba for quite a few years, so had had time to build their local networks, indicating that the degree of sociocultural adjustment and adaptation could be related to the amount of time in a sojourn, as sustained by Ward and Kennedy (1994). Furthermore, while they have sought to go beyond their

sojourner social networks, this may be out of necessity in order to cope with scarcity, and they remain reliant upon them. Finally, quadrant D represents sojourners that become fully integrated into local life, through a process of “sociocultural adjustment over time” or “adaptation” (Ward et al, 2001, p. 229), largely as a result of marriage to a local Cuban. Because of the high degree of segregation between Cubans and sojourners, described in 2.5.2.3, and the operation of a dual economy in which sojourners and locals live within different economic models, described in 2.2.4, integration is not common and most sojourners will remain close to the sojourner “community”, as well as maintaining numerous local contacts and networks, which will help them access a better quality of life, as described by Jaime in 5.3.2.4.

Thus, sociocultural adjustment can be seen progressively, as depicted in Figure 6.10.

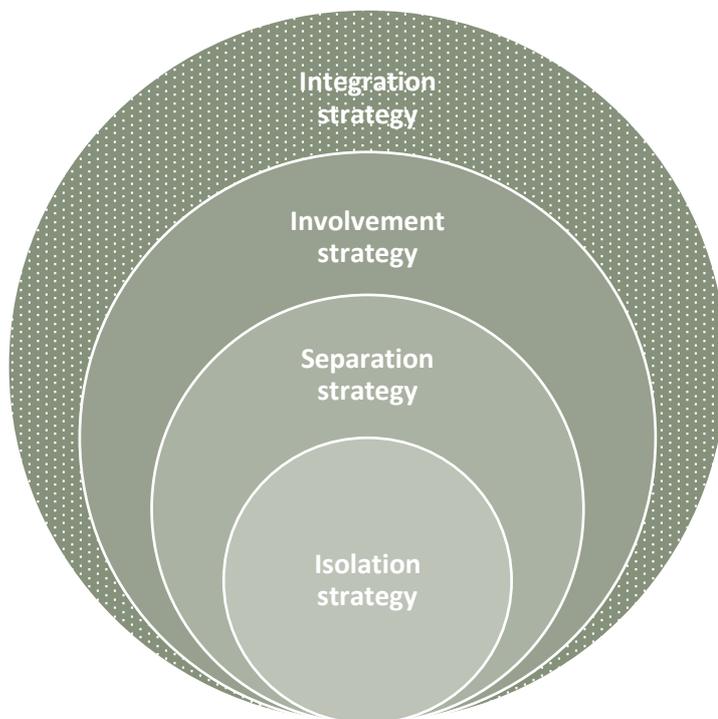


Figure 6.10 Sociocultural adjustment progression of sojourners over time

This first demonstrates how an isolation strategy forms a narrow base focused on immediate work and family relationships. As the range of relationships broadens through wider social interaction by building networks with other sojourner groups, the circle can also be seen to broaden, and even more so as sociocultural involvement with local life deepens. Progression towards sociocultural adaptation can be seen to depend on the length of the sojourn and the circumstances, attitudes and strategies of the individual or the sojourner group and this is in line with recent research in this

area, as summarised in Ward et al (2001). However, because of the nature of the context described in this study, it could be said that progress to full sociocultural adjustment is inhibited. For example, in rare cases where a foreign resident does become fully immersed in local life, such as in the case of Joan in 5.3.3.5, sojourner social networks may fall away and be replaced by strong local networks, represented by the shaded outer circle in Figure 6.10. This is possibly the reason that Joan said that she liked to retain contact with sojourners, as she talked of her deep involvement in Cuban society, which she felt was monitored and possibly artificial and wished to connect with other nationalities in the sojourner community. In such rare cases, citizenship is still not granted by the Cuban government, so full national assimilation cannot occur, but there are a number of cases of sojourners who have married locally and have been allowed to stay long term whilst maintaining their foreign resident status. In contrast, sojourners in quadrants A and B tend to remain within their immediate organisational or social environment and may interact very little with the local sociocultural environment. However, as we have seen in the previous section, sojourners who build even limited social networks may well feel very well psychologically adjusted to sojourner life and perfectly at ease with their sojourn. In this sense, in this study it is psychological adjustment that predominates over sociocultural adaptation over time, even in the cases of long term sojourners, possibly because of the obstacles to fluid and easy contact with the local population. However, it could be said there are different types and degrees of sociocultural adjustment, as this study demonstrates that there creating social networks amongst a segregated sector of the population is, in itself sociocultural adjustment, albeit more limited than the opportunity to adjust to the wider society.

Overall, most sojourners remained in quadrants A and B, with only some venturing into quadrant C, over time and often through necessity, and barely a handful of the people I met could be described as occupying quadrant D. The segregation of sojourner life, described in 6.2.4 played a substantial role in this and the level of contact with locals, which tended to be higher amongst longer term, non-diplomatic sojourners, also increased the element of risk for sojourners, given the level of informality and control in Cuban life, and this created an obstacle to sociocultural adaptation. This is discussed further in Chapter 7.

6.2.3.6 Summary

In summary, then, this study builds on previous research that indicates that social support and social networking can play a key role in the psychological adjustment of sojourners. As we have seen, in this context, this involves institutional support, informal support mechanisms and social networks and the individual strategies of sojourners drawing on their own resources. In the particular context of Havana, in general, it can be said that, at the beginning of the sojourn, it was common for sojourners to rely on groups related to their new life, particularly those that formed around work and school and related social life. There were numerous welcome events at the beginning of the school year or when post holders changed over, so that newcomers could meet up and begin to establish ties and multiply their contacts. Over time, sojourners adjusted more to their environment and natural friendship groups and stronger ties became prominent, which enabled sojourners to gain access to resources and greatly influenced the quality of life of individuals. This process is in line with a “stress and coping” model of psychological adjustment, which highlights the importance of social support (Ward et al, 2001, Ong and Ward 2005).

Networks could then open up into more complex formations for individuals who were interested in getting to know people beyond their immediate work or family group. Of particular significance were the local networks, which enabled sojourners to get closer to locals and develop a sociocultural understanding of local life and conditions. In the longer term, social networking, then, could be seen to be a precursor to a wider sociocultural adjustment as networks involved increased contact with and a more profound interaction with the host environment. This process is in line with much of the research on social interaction amongst expatriates, which comes from a “culture learning model” and how expatriates conduct their everyday social life and interact at work is considered an important element in adjustment to a new environment (Church, 1982; Furnham and Bochner, 1982; Ward et al, 2001; Ward and Kennedy, 1999; Ward and Rana-Deuba, 2000).

The study, however, also shows that individuals make choices as to the degree of integration they seek into a new environment, whether in order to preserve or develop their own identity (Berry et al, 1989; Ward and Kennedy, 1994), or protect their self-esteem (Tajfel, 1982). What is of particular interest here is the range of

decisions that individuals made as to how widely they interacted, with some remaining within their immediate and familiar social circles and while others embraced their host environment more fully. It was common to see, for example, that many individuals felt satisfied and psychologically at ease while socialising with family and friends of the same nationality and from the same work organisation, while bypassing the language, people and cultural products of their new environment. As we have seen, many individuals preferred to remain in tight knit in-groups that enjoyed high levels of trust and internal cohesion and which tended to shun contact with locals or with others outside their own immediate work or social group. This often resulted in participating in stereotyping and making unfavourable comparisons between their own in-group and the local society. Such expatriate “enclaves” could provide both psychological comfort and social contact, such as that described in Selmer and Luring (2009). However, as these authors describe and as we have seen, the pressure of the in-group may come at a price for those who wish to seek closer contact with the host culture on a social level, as the social structure of the in-group impinges on individuals through spillover elements from the working environment in the form of rewards and sanctions that facilitate cohesion and exclusivity. In contrast, there were others who developed broader networks among individuals of a wide range of backgrounds, including a number of local Cubans, learnt the local language fluently and developed a more substantial sociocultural understanding of their environment. However, as we have seen, the degree of sociocultural learning and integration was inhibited by certain aspects of the context of Havana and the contribution of this study is that it demonstrates how this can influence the degree and nature of adjustment. High levels of scarcity, control and isolation in Havana intensified the focus on the process of psychological adjustment and drew focus away from sociocultural adjustment. Personal and institutional resources and social networking were directed towards establishing an acceptable environment for everyday life, which, to a certain extent, constrained the process of sociocultural adjustment. As a consequence, the lack of social contact and interaction with local people could impede understanding of the behaviour of people from a different background and, in turn, could also foster a fairly hostile or negative approach to the host environment.

6.3 A model for understanding sojourner culture shock

While much of what has been described can be seen to be consistent with previous research, then, it is the particular context of Havana as a politically sensitive environment that creates substantial new and unusual demands that create challenges for sojourner adjustment. From the discussion above we can devise a model for understanding “culture shock” and the adjustment process set out in Figure 6.11.

As described, the new environment is largely unfamiliar for sojourners and there will be new demands from a number of sources. These demands may be perceived as challenges, if they are onerous, or opportunities if they are effortless or attractive. For example, being able to communicate in Spanish is a new demand in Cuba, but it would not be a challenge for someone who is already a fluent speaker, or it may be seen as an attractive opportunity for someone willing to learn it. The type and source of the new demands are depicted in the first two boxes of the left of the model. On the one hand, as we have seen in Figure 6.4, sojourners in Cuba encounter a way of life that is influenced by a number of factors, including the physical environment, geopolitical processes the historical political and economic background and the resulting sociocultural practices, institutions and rules of behaviour, and the social and cultural behaviour, products and processes that have evolved in the location. There will be observable practices, such as the way people dress and go about their daily lives, and there will be more subtle norms of behaviour, such as the way people speak or how they behave, all of which sojourners have to make sense of and negotiate. Some of these elements within the new environment may be perceived by individuals as so different to their background and experiences that they can be a source of stress in the adjustment process. Some examples from the study were the excessive surveillance and control, dealing with vendors through the informal economy, the hot and humid climate, different attitudes to privacy and so on. As we have seen, these vary from individual to individual.

Coupled with this, are the life changes, summarised in Figure 6.5, which individuals will bring to the new situation and as a result of relocation, such as changes to their personal or professional situation, which may cause anxiety in the adjustment process. Some examples from the study were the loss of personal support networks, having to play a more prominent role in the home, or having had to take a career

break and so on. Again, this varies according to each individual and relocation for many creates a sense of opportunity and growth.

Moving to the right, the middle boxes represent the kind of resources and processes that can help sojourners resolve the obstacles they face, as a result of increased and new demands. These may be personal or individual qualities, as outlined in Figure 6.6, and include skills traits or behaviours that enable an individual to adjust to an unfamiliar environment, such as experience, language skills, personality, wealth and so on. As well as these personal resources, sojourners may receive help and support from their employer, school or local sponsor or through informal ties that will address their social and living needs and supporting them in the adjustment process, as summarised in Figure 6.7. As we have seen, this can help them settle in, resolve bureaucratic problems, find housing and introduce them to the setting through guidance and tailored help and social support. Sojourners in the study also described how they build social ties and networks through work, socialising and contact with the local population, as outlined in Figure 6.8. These are a combination of weak and strong ties and open and closed networks of differing density and serve to resolve practical problems or generate social companionship necessary for psychological adjustment. Finally, wider friendship networks and local networks facilitate a deeper and more sustained sociocultural adaptation as time goes on.

The two boxes with arrows below and above these adjustive processes and resources indicate the psychological and sociocultural processes related to adjusting to the new setting. The direction of the arrows on the right hand side of the model in the middle indicate that adjustment is a process that moves from the initial impact of arrival towards a more settled and adjusted lifestyle as time progresses. In this sense, the “shock” in “culture shock” refers to the increased levels of psychological stress and the process of sociocultural learning that results from the increased level of demands and lifestyle changes in a new and unfamiliar environment, such as Havana or Cuba. Reactions and responses to this are essentially individual and can vary according to individual or group or as the environment becomes more familiar. The “culture” in “culture shock” refers to the way of life in a particular location and the physical, behavioural and extra-situational dimensions of the context. Overcoming “culture shock” will involve adjusting to both the way of life in a particular location and the changes in lifestyle that result from re-location and the degree to which and the

way this happens is essentially negotiated by each individual. However, it is particularly important to make the point that such a model, as with all the analytical tools in this chapter, is a static representation of dynamic social processes and that, while it is an aid to understanding, it does not capture the complexity of day to day social behaviour.

In the final chapter, I draw out the main conclusions of the study and look at the implications for research and international organisations involved in relocation.

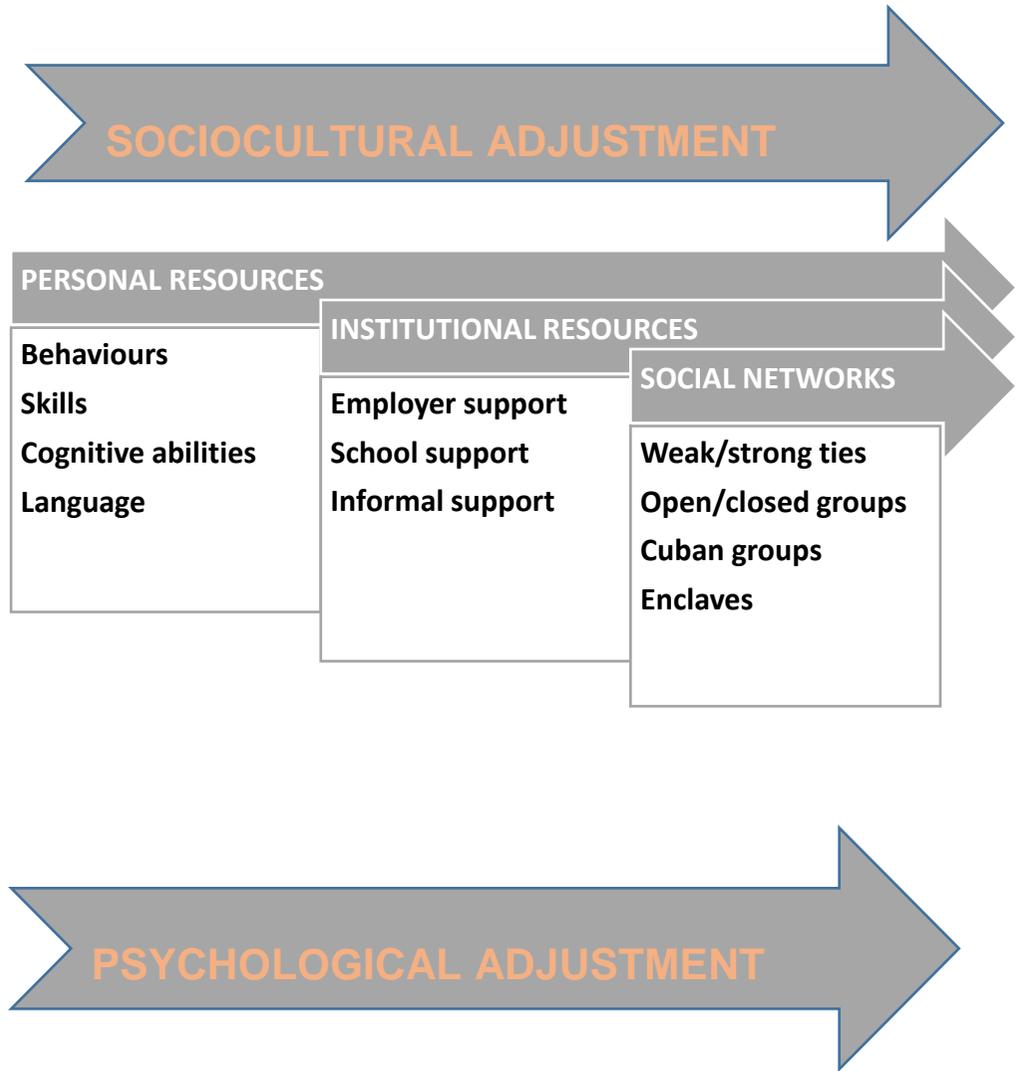
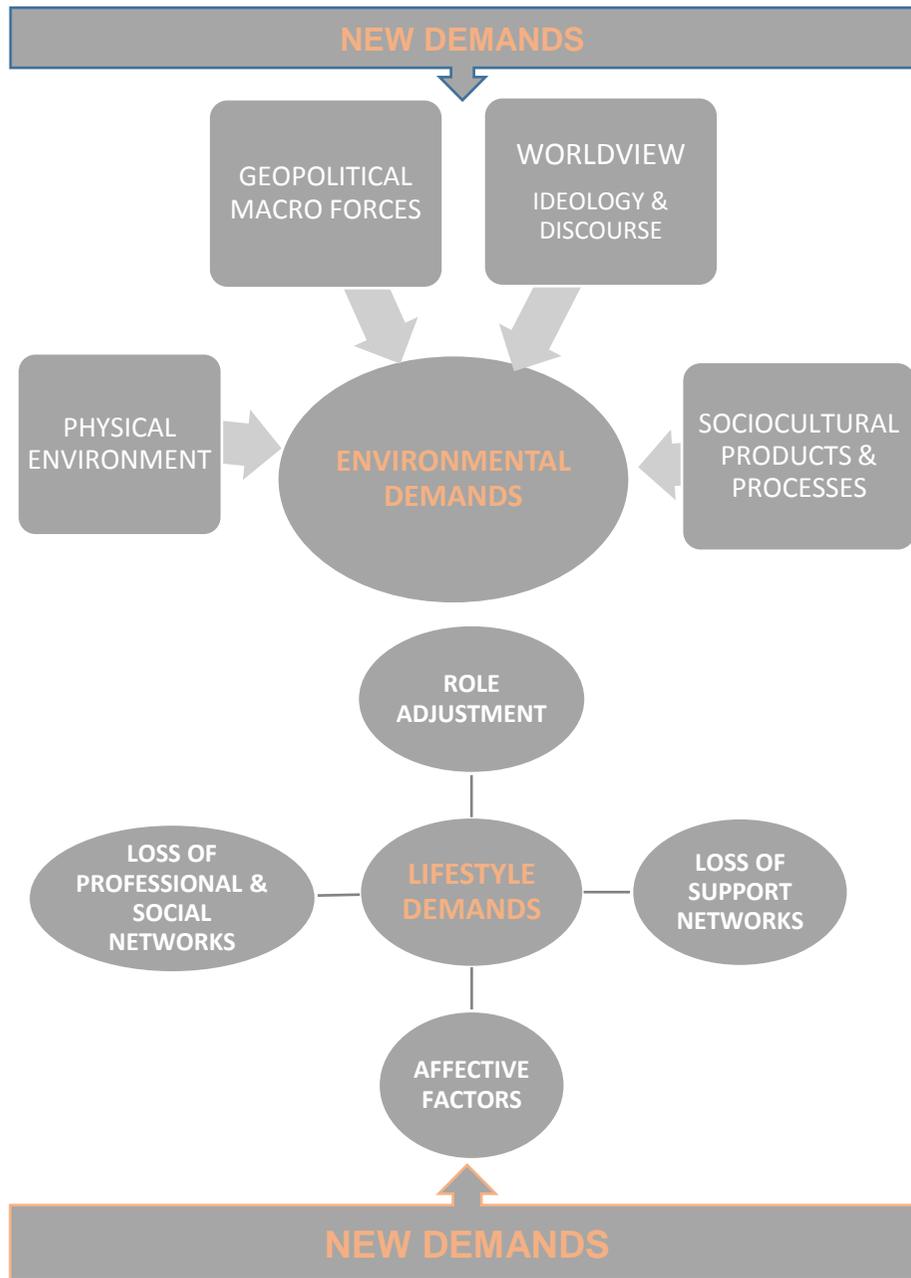


Figure 6.11 A model of sojourner culture shock

Chapter 7. Conclusion

7.1 Introduction

This chapter draws final conclusions about “culture shock” in relation to the research questions of the study, which seek to investigate, through an ethnographic approach, the challenges that sojourners face adjusting to life in Cuba and how they coped with them. It also looks at implications for the role of international organisations in relocation.

7.2 The salience of context

A non-essentialist view of culture brings into focus the salience of context in which social interaction takes place and this is a key part of interpreting social behaviour. We have seen in detail in 3.2.3 that context can be described as a “frame” (Goffman, 1974) around interaction, but also that it is a complex of a number of dimensions, including the “setting”, or social and physical environment, the behavioural environment and extra-situational factors (Duranti and Goodwin, 1992), interpreted by the social actors within it (Day, 2008). Context is also influenced by what participants bring to it, how they associate with each other, the roles that they play and the “elements of a distal context” (Day, 1980, p.980), such as one’s ethnicity or social position, brought to bear on the setting.

In this sense, as we have seen, Cuba is a highly politicised society that experiences considerable economic and geopolitical pressures, which can have a profound effect on the quality of everyday life, as described in Chapter 2. The resulting levels of scarcity and economic distortion, initially created by the international embargo, and exacerbated by the dual economy and the informal economy, which have developed since the Special Period in the 1990s, have contributed to growing inequality and elitism in society. While the level of inequality is certainly much less than in many other developing nations, particularly in Latin America, it has a deep impact on the morale of the Cuban people, proud of their revolution and still committed to its core principles. As a result, these pressures have led to political and social measures, which seek to preserve the successes of the Cuban revolution in the face of ever dwindling resources and which impact upon freedom and transparency. Many of the challenges described by sojourners in this study have their origin in the context of

their sojourn and emanate, as we have seen in Chapter 6, not only from the physical context, but also from the macro geo-political context and the “particular social and political structures” and “particular cultural products” (Holliday, 2011, p.131) and processes that have evolved in the context. In this sense, an understanding of context is essential for understanding behaviour and interaction (Gumperz, 1982) and it follows that sojourner adjustment in Cuba is affected by the nature of the context of Cuba.

An important element of the context is the notion of “gaze” (Foucault, 1977), in which visitors “wield power through the way they look at locals and expect them to appear and behave” (Stronza, 2001, p. 271) and in which the local population can “turn back the gaze” (ibid, p. 272) and influence social interaction with visitors. This is particularly apparent in the “tourist gaze” (Urry, 2002) on Cuba, represented by the tourist industry and popular journalism, which can create both exotic expectations of the context and benefits to the local economy. But, it also includes the ideological “gaze”, either through the “demonisation” of the Cuban regime and the subsequent effects of the embargo on the economy, or through its “exoticisation” (Holliday et al, 1994, p. 59) through the icons and myths of the Cuban revolution, which can also be used by the regime to legitimise its actions within the realm of international public opinion (Aguirre, 1982). In this sense, for example, the discourses interpreting the US embargo of Cuba, can either seek to explain it as a necessary measure in order to defend human rights, or, alternatively, as imperialist aggression and a reason for scarcity, depending on the worldview. Likewise, the reform process begun by Raúl Castro in 2008, can be seen as a necessary measure to preserve the successes of the Cuban revolution and eliminate corruptive practices amongst enemies of the revolution, or it can be seen as a justification for increased repression and preservation of the status quo for the benefit of a political and social elite. All of this has a subtle, but deep impact on daily life in Cuba and, thus, has a deep impact on sojourner experiences and adjustment to it. Ideologies and discourses can interpret and justify economic scarcity, social control, elitism, repression and so on in various ways, possibly masking or distorting their cause and contributing to their existence in a politically sensitive context.

7.3 Adjustment in politically sensitive locations

The nature of Cuba as a “politically sensitive location” (Bell, 2013), created, on the one hand, a good number of environmental demands and challenges for sojourners and, on the other, a good deal of stress, which exacerbated lifestyle changes experienced by sojourners. However, we have also seen in this study that not all challenges had their source in the environment. A number of the participants referred to difficulties associated with lifestyle changes, although it is fair to say that the politically sensitive context of Cuba stifled some of the resources that might have alleviated psychological unease, particularly in the area of communications and economic availability. For this reason, in such a challenging context, aspects of psychological adjustment are particularly salient, with high levels of emotional and social support required in order to adjust to daily life. Furthermore, the importance of establishing strong ties through supportive networks amongst sojourners is a common feature of the accounts presented in this study. While weak ties through large social networking events were seen as important in order to extend a wide collaborative network, as indicated by Granovetter (1973), sojourners tended to rely heavily on quite closed, dense networks for emotional support and companionship, as indicated by Milroy and Milroy (1978) and Krackhardt (1992).

While most sojourners overcame initial difficulties in adjusting to their new environment, there were some sojourners who suffered emotional distress caused by difficulty in personal relationships, serious illness and prolonged detention without charge and the strong ties that they formed were of substantial support to them. However, the density of these networks tended to inhibit the degree of sociocultural adjustment that sojourners experienced, particularly amongst groups who had substantial institutional support through large embassies and companies, which tended towards enclavism, as indicated by Lauring and Selmer (2009). The extent to which individuals or groups broke away from expatriate enclaves could be judged to depend on a number of factors. Sojourners, for example, with a high level of personal resources, such as language ability, previous experience, tolerance of difference and curiosity towards the new environment, would seek greater sociocultural contact. Individuals demonstrated a range of personal resources, which they used to overcome obstacles and resolve ambiguities for themselves, though there were differences in the level and application of these.

On the other hand, sociocultural adjustment could be inhibited by the Cuban government's tendency to segregate and monitor foreign residents, restricting access to genuine and trusting relationships with the local population, and it could be said that this encouraged isolation or separation amongst sojourners. In this sense, contact with local suppliers, staff and privileged individuals, many of whom were allowed, or even required, to have contact with sojourners in order to monitor them, created a degree of ambivalence in genuine sociocultural contact and, consequently, many sojourners who did have contact, also maintained substantial social networks amongst other sojourners.

It is important to note the element of individual choice in adjustment, however, as it is clear from some of the examples in the study that the desire to engage with their environment could enable some individuals to accelerate their sociocultural adjustment. Likewise, many longer term sojourners sought to limit their involvement in local life and focus on building extensive networks amongst other sojourners, thus retaining their sense of identity. On the other hand, for some, this may have been a necessity, either because they did not have access to a large expatriate group, with a tendency to be fairly closed and exclusive, protecting status and identity, as indicated by Tajfel's Social Identity Theory (1982), or because they needed to access local networks for goods and services. There was also a notable difference in sociocultural adjustment between sojourners who had diplomatic status and who were in Cuba for just three years or so, and non-diplomatic, longer stay business or journalist sojourners. Shorter stay diplomats had less need to widen their social network and there was more of a tendency for them to insulate themselves in tightly knit, dense groups amongst work colleagues or nationality groupings, or through wider, separate networks formed with other sojourners, and who could import goods through their embassy. On the other hand, longer stay sojourners had a tendency to develop much more open, looser and varied networks, which gave them necessary access to supply networks and which sometimes included some of the local population. There was also an increased element of risk for non-diplomatic sojourners, as much of the contact with the local population could be informal, and either subject to official scrutiny or ambiguous in its legality, because of the high level of politicisation of decision-making and the absence of non-governmental structures and institutions.

Finally, what was clear is that help and support from others in the new environment was perceived as beneficial and could influence how people overcame difficulties. Much of the support and resources could be formalised at an institutional level, through employers, schools and welcome groups, though a good part was informal and on a voluntary or goodwill basis. In this particular study, it was notable that the level of resources dedicated to this by employers varied considerably amongst sojourners, with some groups receiving a high standard of “duty of care” and others receiving very little institutional support and this could influence the level of stress or “shock” that people expressed. On the whole, then, there was a good deal of variation in how individuals responded to their new environment and how they approached their new experiences, which would suggest that adjustment cannot be reduced to a simplistic “stages” model applied to all.

Overall, then, both a range of initial challenges and a range of ways of coping with them have been observed amongst sojourners in Havana in what could be described as a difficult expatriate assignment for the reasons mentioned above. The high level of uncertainty in everyday life for sojourners, characterised by scarcity and politicisation, drew them fairly close together, which, in turn, could be intensified by the some of the alienating aspects of the context or the reticence of some of the participants to engage more fully with local life for a range of reasons and choices.

7.4 Taking the “culture” out of “culture shock”

The aim of the research project is to gain a greater understanding of how expatriates and their families adjust to a new and unfamiliar environment on re-location and deal with what is commonly known as the “culture shock” associated with expatriation in a particular context. As we have seen, moving to a new environment has an affective dimension, expressed through changes in emotional state, such as stress and sense of loss, a behavioural dimension, manifested through not understanding how to behave in the new environment in the face of different norms and rules of conduct, and a cognitive dimension, which affects what a person thinks and believes about the world and the new environment and their place in it, and the ability to negotiate through language and communication.

However, it is important to treat “culture shock” as a dynamic, discourse-based notion, influenced by contextual factors, rather than a set of immutable qualities and

characteristics of a given group of people based on national stereotypes. As defined in 3.2.4, “culture” is seen from a “non-essentialist” point of view (Holliday et al, 2004), as a particular way of life (Williams, 1981) associated with a given context and “shock” refers to the stress and anxiety involved in adjusting to an unfamiliar environment. In this sense, it is fair to conclude that “culture shock” is not really about “culture” at all, but more about “context”, which is characterised by “dynamic mutability” (Duranti and Goodwin, 1982, p. 5), rather than a static, reified environment with essential characteristics. Furthermore, however, because the notion of context must also take into account “the capacity of human beings to dynamically reshape that context” (ibid), created through “universal cultural processes” (Holliday, 2011, p.131), “culture shock” is as much about what individuals bring to a given context and how they deal with the changes in their lives in that context, whether at work, at school or in the social environment. In this sense, a reference to “culture” as the source of anxiety masks the underlying factors and processes that influence social behaviour in context and can encourage stereotyping, prejudice, “otherisation” and “culturism” (Holliday et al, 1994, p. 23-4). It can also inhibit adjustment and lead to the tendency to form “closed enclaves” (Lauring and Selmer, 2009) and possible “failure” in the assignment (Aycan, 1997).

Furthermore, what is probably more important is how the feeling of “conflict and stress” (Aycan 1997, p. 436) associated with “culture shock” can be minimised and how individuals can be helped to increase their “effectiveness” (ibid) in their new environment. This encompasses different levels of psychological adjustment and sociocultural adjustment (Ward et al, 2001) and may involve adjustment in different “domains” (Black et al, 1991), notably “work” and “non-work” (Shaffer & Harrison, 1998). In the case of sojourners in Cuba, for example, while most were there for work purposes, some, particularly diplomats, had a defined number of years in mind for their sojourn. For shorter sojourns, and particularly at the beginning, the salience of resources for psychological adjustment are paramount, with an emphasis on social support and social networking (Ong and Ward, 2005) within the sojourner environment, while issues of role adjustment amongst families and spouses are also prominent (Harvey, 1995; Haslberger and Brewster, 2008). Other sojourners, particularly those running their own business, are there for a longer time and become more involved in local life through a gradual process of sociocultural adjustment and adaptation “over time” (Ward et al, 2001, p.229), although it is debatable to what

degree a foreign migrant could become fully adapted due to the fact that they always retained non-Cuban status and were excluded from services provided by local institutions.

7.5 Implications for research

Taking this view of “culture shock” and “adjustment” into account, future studies could focus more on context-related behaviour, particularly those from an international management perspective, seeing intercultural communication as “interdiscourse communication” (Piller, 2007, p.209). Much of the insight into the nature of culture and communication comes from Linguistics and Anthropology, where a social constructionist approach is taken (ibid). Studies from an international management perspective, on the other hand, tend to see culture from an essentialist perspective (Bjerregaard et al, 2009). In this sense,

Rather than taking culture and identity as given, social constructionism insists that it is linguistic and social practices that bring culture and identity into being (Burr 2003). The essentialist assumption that people belong to a culture or have a culture, which is typically a part of intercultural communication and cross-cultural communication studies, has given Intercultural Communication a somewhat old-fashioned, dowdy, not-quite-with-it, even reactionary image”
(Piller, 2007, p.209)

Thus, “there is a need for richer accounts of the social, economic and political contexts that are constitutive of interaction in multicultural settings” (Bjerregaard et al, 2009, p. 219) and a need to address the kind of discourse and power relationships that are evident in a context such as those outlined in this study. In this sense, an important contribution of this study is the application of a non-essentialist perspective to concepts such as “culture”, “culture shock”, “adjustment” and “context” used frequently in international expatriate research in order to understand them better and within a specific setting.

Another contribution of this research project for future research is the demonstration of the value of sociological imagination in restrictive research contexts, where open research methods may be inhibited and need to be adapted, as in the case of Cuba. Sociological imagination has enabled me to “shift from one perspective to another” by

“making the connection between “the personal troubles of milieu” and “the public issues of social structure” (Mills, 1959, p.6). Through this, as demonstrated by the culture shock model in 6.3, I have been able to trace “linkages amongst a great variety of milieux” (Mills, 1959, p. 7) within the frame of structure and context, embracing aspects of the physical context, geopolitical macro forces, differing worldviews and sociocultural institutions and processes, as well as the “troubles” of changing lifestyles on an individual level. All of this contributes to a rich ethnography of sojourner adjustment in a particular context, which may inform future approaches to research.

7.6 Implications for international organisations

Adjustment is a complex and lengthy process and is largely underestimated by international organisations, and this was notable in this study. It is arguable that, in such a challenging context that Cuba is for international sojourners, attention to the adjustment process of employees and their families is of greater importance than less insulated contexts. As we have seen, some individuals and families were given little support and resources and were left to their devices to adjust to their new location, despite the research that suggests that psychological adjustment to an international assignment is likely to be most difficult for the expatriate partner (Harvey, 1998). The loss of vital support networks (De Verthelyi, 1995) and poor emotional adjustment can affect relationships and affect the success of an international sojourn (De Cieri et al, 1991). Simple measures that can help were mentioned by some of the sojourners, such as the provision of information on how to obtain goods and services on arrival, arranging social contact fairly early on in the sojourn and setting up a “buddy” system for concrete support and help.

On the other hand, the larger embassies and companies did provide a lot of concrete support and protection and enabled employees to build networks through work socials and events, such as the “Polar Bar” evenings at the Canadian Embassy, indicated in Appendix B. Any investment in building a wider support network for all the family is of particular benefit and organisations need to be aware that lack of support to family members may put extra stress on expatriate managers themselves as part of a “spillover effect” between home and work and stress “crossover” between partners (Harvey, 1995, Haslberger and Brewster, 2008), if their families are unable to adjust to their new life. This can also have an impact on the success of sojourn

and assignment. In this sense, it is probably the level of resourcing that is important, although much can be done informally and at low cost with the right amount of awareness raising.

7.7 Limitations of the research

Cuba is a unique setting and a challenging one for academic research. We have seen it described as a “forbidden research terrain” (Fuller, 1988), which inhibits free access to research opportunities without official permission (Hollander, 1998; Hirschfield, 2007), and this has influenced the approach taken in this study. I described in Chapter 4 that I felt constrained to carry out a covert study as a participant observer and to build up a “thick description” of everyday life for sojourners in Cuba. This experience of immersion has allowed me to gain a diverse view of sojourner adjustment to life in Cuba in a research context that is largely insulated from independent scrutiny, because of censorship and social control, and to discover everyday life from a number of different perspectives, including the official dominant discourse and the everyday demotic discourse (Baumann, 1996), as well as various international viewpoints. It is an example of a “bottom-up approach” in intercultural communication research (Holliday, 2013, p. 29), because it entails “direct observation of the complexity of cultural behaviour” (ibid, p.42), and “communication and identity making in context” (Piller, 2011), and in this sense, it re-iterates the value of ethnography in revealing the nature of social life in sensitive situations that may otherwise be protected from scrutiny.

However, such an approach is characterised by a great deal of subjectivity, although I have sought to reduce this by being systematic and rigorous in the research process. I have attempted to mitigate this by trying to be as impartial as possible, “coming out” as researcher and “coming clean” with my research agenda and my own perspectives about Cuba. I have also attempted to give voice to different viewpoints but, at the same time, recognising that I do not speak for others. I have also been punctilious about protecting identity in order to address ethical considerations and to safeguard any repercussions for those remaining in Cuba.

This research study has limitations in that it focuses on a particular context and its findings may not be generalizable to other situations. It would be fair to say that relocating to Havana is an extreme example of intercultural adjustment, given the

level of restrictions, control and scarcity described. However, comparisons could be made in social contexts where ideology or belief dominate and control everyday life and this study offers insight into how people respond in such circumstances and describes many of the elements involved in overcoming “culture shock”. On the other hand, in less authoritarian contexts, different aspects of the model might gain prominence over others or may impact more or less on the salience of psychological elements or the sociocultural adjustment process.

In conclusion, the value of the context-sensitive quality of ethnography can serve to interpret the intricacy of everyday life from the viewpoint of the participants in what is a challenging environment for sojourner adjustment. This study thus gives valuable insight into everyday life and the adjustment process in a highly complex context.

7.8 The future of Cuba

While I have pointed out that this study is not about Cuba itself, because of my first-hand experience and the high level of interest in recent events on the island, I would like to conclude this thesis with a personal view on how I see Cuba evolving as a destination for relocation and daily life. Cuba is very much in the news at the moment, because of the historic re-establishment of relations with the United States (Reuters, 2015, July 1; BBC, 2014, December 18) and the context is ever evolving and potentially different to when I was located there. In harmony with the way I have approached presenting information about Cuba in this thesis, I have sought various voices and discourses – dominant, demotic, sojourner and local - to try and capture a range of views. The overwhelming tone of the reporting in international news channels is, perhaps quite rightly, sensationalist, in that it has “ended more than a half-century of enmity” (New York Times, 2014, December 17). The re-establishment of relations with the US is seen as a step forward and a possible precursor to lifting the embargo, although this will be resisted by the anti-Castro lobby in the United States. From another point of view, the first official words of Fidel Castro in response to the raising of the US flag at the US embassy were characteristically anti-US and highlighted the historical issues of the embargo (BBC, 2015, August 15). Likewise, the blogosphere is sceptical and calls for the government to “accept the existence of civic structures that have the right to express opinions, decide, question and choose” (Sánchez, 2014, December 18). This would require fundamental political change and

we have been told that the reform will not affect the political system and will not allow the creation of individual wealth (BBC, 2014, December 20).

Recently, I had a conversation with an Italian waiter in Rome, married to a Cuban, who had been to Cuba on holiday to visit family. I asked him about how things were going after the recent exchanges with the US. He replied, "*Ancora peggio!*" ("Worse than ever!"). From sojourner contacts I still have in Cuba, the view is that local residents still face acute shortages of basic goods and it would seem that the re-establishment of relations will mainly stoke the tourist trade. This is a great source of revenue for the government and vital to be able to fund the communist system and retain its revolutionary heritage. However, as we have seen, it is also a major source of growing inequality in Cuban society, if wealth is not shared more widely, and it remains to be seen what the concrete changes will be for people who live in Cuba.

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Appendices

APPENDIX A: EXTRACT FROM GRANMA

Granma is the "Official Organ of the Central Committee of the Communist Party of Cuba"
(English version accessed Monday June 28, 2010)

Updated 3:30 P.M. (Local Time)

Havana, Saturday June 26th, 2010. Year 14 / Number 178



OFFICIAL ORGAN OF THE CENTRAL
COMMITTEE OF THE
COMMUNIST PARTY OF CUBA

Visit us daily at: <http://www.granma.cubaweb.cu/english> <http://granma.co.cu/english/>

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SPEECHES BY FIDEL

PHOTO GALLERIES

► Perhaps when addressing ideology we will have to tackle this issue too because this is about ideology and many people do not understand that the socialist State, or no state, no system can give out what it has, and much less it will have if it is not able to produce it, particularly if it is giving out money with no productive response. I am sure that excessive work posts, the excessive amount of money given to the people, idle stocks and waste of resources have a lot to do with the huge number of unprofitable companies we have in the country
Fidel, December 1, 1986

► [Supply of Idle Land Increased in Ciego de Avila](#)

The supply of idle land to individuals and legal entities in the province of Ciego de Avila amounted to more than 66,000 hectares, as a way to increase food production and reduce imports

► [Cuban Expert Highlights Benefits of a Planned Economy](#)

Cuba has many advantages to address the effects of the general crisis of capitalism, said the director of the Center for the Study of the Cuban Economy, University of Havana, Anicia Garcia Alvarez

► [ALBA Summit Committed to Build Fairer Societies](#)

The 10th Summit of the Bolivarian Alliance for the Peoples of Our Americas (ALBA) wound up here after adopting a declaration favoring the consolidation of a commercial treaty and the wipe-out of the exclusion of indigenous people and persons of African descent, AFP reported



► [Vice President Lazo in Ecuador for ALBA Summit](#)

Cuban Vice President Esteban Lazo arrived in Quito Thursday to participate in the Summit of the Bolivarian Alternative for the Peoples of Our

Americas (ALBA), whose segment at the level of Heads of State is scheduled for

► [ALBA Summit Begins with Experts Meeting](#)

The summit of the Bolivarian Alternative for the Peoples of Our Americas (ALBA) began here today at the level of experts, with the presence of some 300 government delegates and representatives of the region's indigenous peoples and those of African descent

► [UN Notes Venezuela's Efforts in the Fight against Drugs](#)

The president of the United Nations Organization (UNO), Abdessalam Ali Treki, said he was pleased to learn of the efforts of Venezuela in the fight against drug trafficking, reported Prensa Latina

► [Lectures on Cuba in Sri Lanka](#)

Nirsia Castro Guevara, Ambassador of Cuba, gave a lecture in Colombo, the capital of Sri Lanka, on the health system of the Island and 50 years of relations with that Asian nation

► [Silvio Rodriguez Satisfied with US Tour](#)

"I think we did a good job and we feel good for that," said Cuban songwriter and singer Silvio Rodriguez upon his return to Havana after having given several concerts in the United States and Puerto Rico

SPEECHES BY FIDEL

► [Speech delivered by Dr. Fidel Castro Ruz, President of the Republic of Cuba, at the foundation ceremony of the "Henry Reeve" International Contingent of Doctors Specialized in Disaster Situations and Serious Epidemics, and the national graduation of students of Medical Sciences, in the Ciudad Deportiva, on September 19, 2005.](#)



► [Remarks by Dr. Fidel Castro Ruz, President of the Republic of Cuba, meeting with the medical doctors assembled to offer assistance to the American people in areas affected by hurricane Katrina, Havana Convention Center, September 4, 2005.](#)

► [President Fidel Castro reiterates Cuba's offer of medical aid to the American people on the Round Table program aired on September 2, 2005.](#)



[CAMILO ACCOMPANIES CHE IN THE PLAZA OF THE REVOLUTION](#)



[THE LATIN AMERICAN SCHOOL OF MEDICINE](#)

[THE REPUBLIC OF BOLIVIA JOINS AND SIGNS THE JOINT DECLARATION SIGNED IN HAVANA ON DECEMBER 14, 2004 BY THE PRESIDENT OF THE COUNCIL OF STATE OF THE REPUBLIC OF CUBA AND THE PRESIDENT OF THE BOLIVARIAN REPUBLIC OF VENEZUELA.](#)

► [Brilliant performance by Carlos Acosta in Japan](#)

Monica Mason, director of the Royal Ballet said it is a pride of her company to have the presence of Carlos Acosta, the Cuban dancer, who w today at the Tokyo Bunka Kankan Great Theater of Japan

► [Cuban Ambassador to UK Visits Northern Ireland](#)

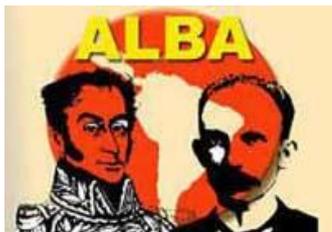
Rene Mujica Cantel, Ambassador of Cuba in Britain, visited the city of Belfast, Northern Ireland's capital, where he discussed the possibilities of cooperation between the two parties

► [Stem Cells to Treat Tooth Disease](#)

Preliminary results of stem cell treatment of periodontal diseases, presented yesterday at the International Convention of Dentistry held in Havana, were described by researchers as "very encouraging"

► [We Must Maintain a Revolutionary Attitude toward Work](#)

We must not forget this ever: Only work will lead us to satisfying our needs! And therefore, workers and farmers must have a proper attitude towards work, a revolutionary attitude towards work. It is a must for everyone



► [Otavalo: Final Details for the ALBA Summit](#)

Intense activity reigns today in the Ecuadorian town of Otavalo, where this Thursday the Summit of the Bolivarian Alliance of the Peoples of Our America (ALBA), about the theme of people of indigenous and African descent is about to begin

► [Internationalist Work of Cuban Stomatologists Highlighted](#)

The presence of Cuban stomatologists in health internationalist missions since this tradition of solidarity of the Revolution began in 1963 with the sending of a medical brigade to Algeria was highlighted on Wednesday in Havana during the opening of the Stomatology Convention, attended by Public Health Minister and Politburo member José Ramón Balaguerç

► [Comptroller General Calls for more Self Control](#)

Gladys Bejerano, Comptroller General of the Republic, called today in the city of Ciego de Avila continuing to implement the guide for internal self-control in businesses and bu in the country, as a way to eliminate deficiencies

► [Cuba Remembers 35 Years of Independence of Mozambique](#)

Amadeu Paulo Samuel da Conceicao, Mozambique's ambassador to Cuba, in Havana today highlighted the contribution of the island in the training of professionals and cadres of his country from the time of the revolutionary triumph that ended 470 years of Portuguese colonial rule

► [National Tour of Guido López-Gavilán Begins in Guantanamo](#)

The Música Eterna Chamber Orchestra, directed by Guido López-Gavilán, gave a concert in Guantanamo, the starting point for a national tour that will arrive today to Baracoa

► [The City of Remedios Celebrates its 495th Birthday](#)

This June 24, Remedios, the eighth town founded by the Spaniards in Cuba, celebrates its 495th birthday with a wide-ranging program of activities, which includes the traditional San Juan fiestas and the remodelling of important institutions in the city

► [The WTO, and US Misappropriation of Cuban Trade Mark](#)

The United States was once again criticized at the Dispute Settlement Body of the World Trade Organization (WTO) for violating basic principles related to commercial activities and for allowing the misappropriation of Cuban trade marks

► [Young Cuban Dancer Stars in Venezuela](#)

Javier Torres, leading dancer of Cuba's National Ballet Company, invited by the Teresa Carreño Theater Ballet, shared the stage of the Ríos Reyna Hall with that company's prima ballerina Ethana Escalona for Carmen -in a Venezuelan Héctor Sansana-, in which he played the role of Don José

OPINION

► [DISGRACE IN EL PASO. Revenge in Miami](#)

Cuba will not stop fighting until Posada Carriles, Orlando Bosch and other terrorists like them are convicted of their crimes. Cuba will continue to support the legitimate extradition application presented by the Bolivarian Republic of Venezuela. Cuba will not stop denouncing the cruel kidnapping that is keeping our Five anti-terrorist heroes in isolated U.S. prisons. Our people will not cease in its battle for them to return, dignified and free, to our homeland
The US Blockade of Cuba

► [The Price of a Lie](#)

Since 1955, ten US administrations have not tired in repeating —for purposes of justification— that the economic, commercial and financial blockade against Cuba was and continues to be a reply by the US government to nationalization. These transfers of property were lawfully conducted following the triumphant revolution against the pervasive Yankee monopolies that had for decades drained the resources of the Cuban people

► [More and more mothers see their children die](#)

Sheehan is one of the nearly 2,000 US mothers who have lost children in the war being promoted by Bush. Her son Casey was only 24 when he was killed in Iraq, and Sheehan had harsh words for Bush's assertion that American soldiers were dying for a noble cause. "I want to ask him what that noble cause is," she stressed

► [Mr. Bush's War Brings Death to More and More US Soldiers](#)

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► [The UN: Another Slap in Its Face](#)

The Bush Administration is preparing plans in connection with a so-called post-Castro Cuba, reported the AP news agency from Washington this past Saturday. The story noted that US officials don't want the island's political future "to fall to chance," and for that reason are implementing actions that erase its current image by



APPENDIX B: "POLAR BAR" SOCIAL EVENING

Advert for a social evening known as "Polar Bar" by the Canadian Embassy in Havana

POLAR BAR



Friday October 25, 5:30 - 11:00pm

Embassy of Canada, 30 y 7ma, Miramar

Please join us... where the burgers are grilled and the drinks are chilled!

PLUS...

- 5:30-7:00pm: Lounge Music
- 7:00-11:00pm: DJ Mena

Hope to see you there!

Important - Minors: Minors under the age of 18 must be accompanied by an adult in order to enter the Polar Bar. Legal guardians must accompany their own children and may also accompany a maximum of one child in addition to their own. In addition, all minors under the age of 18 must be accompanied by an adult at all times.

PLEASE NOTE - DEPENDING ON WEATHER CONDITIONS.

The Polar Bar is a networking event open to all Canadians, employees of the Canadian Embassy, diplomats, and others that have been added to the invitation list at the request of a Canadian Embassy employee. Please provide valid identification in order to be permitted access to the Polar Bar. Please note that the Polar Bar is run by volunteers. Thank you for your understanding. Please drink responsibly.

APPENDIX C: LIST OF SOURCES ON CUBA

CUBAN GOVERNMENT OFFICIAL INFORMATION SOURCES

The Cuban government provides a lot of useful source information and news about Cuba through its interface with the rest of the world and its own population, much of which is also published in English. It needs to be borne in mind that this is centralised information and there are no officially recognised independent civil or private institutions in Cuba.

1. **Oficina Nacional de Estadísticas** <http://www.one.cu>
Cuban National Statistics Office
2. **The Cuban Constitution** http://www.cubanet.org/htdocs/ref/dis/const_92_e.htm
“Cuba is an independent and sovereign socialist state of workers, organized with all and for the good of all as a united and democratic republic, for the enjoyment of political freedom, social justice, individual and collective well-being and human solidarity.”
3. **Lista del Cuerpo Diplomático y Consular Acreditado en Cuba 2010**
http://www.cubaminrex.cu/en/directorio-diplomatico/G?tid_i18n=449
List of Accredited Diplomatic and Consular Corps in Cuba
4. **MINREX: Ministry of foreign Affairs website**
<http://www.cubaminrex.cu/en/portada>
Official interface between Cuba and other countries with press releases and relevant lists of personnel
5. **Granma** <http://www.granma.cubaweb.cu>
Described as “The official organ of the Central committee of the Communist Party of Cuba” and is the only national newspaper in Cuba. A weekly version is published in several languages, including English. There is a wide range of local official publications
6. **Juventud Rebelde** <http://www.juventudrebelde.cu/>
“Rebellious Youth” official newspaper of the Communist Youth Union for young people
7. **Bohemia** <http://www.bohemia.cu/>
Cuba’s official and only general interest magazine
8. **Prensa Latina** <http://www.prensa-latina.cu/>
An official Cuba agency, originally set up by Che Guevara, which publishes *Internacional*, for the provision of international news for a foreign audience “written in our own language” (Fidel Castro)
9. **Cuban news Agency (ACN)** <http://www.cubanews.ain.cu/>
Official government news agency
10. **Cuban Institute of Radio and Television** <http://www.cubatv.icrt.cu/>
There is a strong tradition in radio and television broadcasting in Cuba even before the revolution, but all broadcasters were brought under the control of this institute in 1962

Radio: Radio Rebelde, Radio Progreso, Radio Taíno, Radio Reloj TV: Tele Rebelde, Canal Educativo, Canal Educativo 2, Multivisión International: Cubavision

11. Cuban Embassy in the UK <http://www.cubadiplomatica.cu/reinounido/EN/Home.aspx>

Visa information for non-Cubans to visit Cuba

<http://www.cubadiplomatica.cu/reinounido/EN/ConsularServices.aspx#TouristCard>

There are various types of visas for entry into Cuba, which are issued depending on the objective of the trip to be made. A special visa is required for journalists.

Visa information for Cubans leaving and returning to Cuba

<http://www.cubadiplomatica.cu/reinounido/EN/ConsularServices.aspx#PRE>

Cuban citizens need permission to reside abroad and for “Indefinite Departure” described here: This is granted to those Cuban citizens who, even though they are married to foreign citizens, do not fulfil all the requisites to obtain the Permission for Residence Abroad. Those who have the category of Indefinite Departure need to obtain permission every time they travel to national territory. This permission is processed by the consular offices.”

CUBA SPECIFIC WEBSITES AND BLOGS

This section provides a range of specific websites and blogs about Cuba, representing different “voices” both from within and from outside. The common denominator is that they seek to offer a different perspective to the one offered by official sources. Of particular note are the blogs from within Cuba, which are illegal and monitored.

1. Cuba Encuentro <http://www.cubaencuentro.com/>

An unofficial Cuban publication sponsored by the European Union

2. Diario de Cuba www.ddcuba.com

Independent portal dedicated to Cuba based in Spain and sponsored by Spain’s official aid agency AECID

3. Martí News <http://www.martinews.com/>

A radio and TV broadcaster based in and financed by US government transmitting newscasts and programs in Spanish to Cuba “promoting freedom and democracy by providing objective information to the Cuban population that would otherwise be unavailable”. Named after the Cuban national hero José Martí.

4. BLOG: Desde Cuba <http://www.desdecuba.com/>

“From Cuba” portal containing 50 links to local outlawed blogs, including **Yoanni Sanchez’s “Generation Y”** in Spanish and English, described as “from a point of view distinct from that of the Cuban government”

5. BLOG: Cartas desde Cuba (“Letters from Cuba”)

http://www.bbc.co.uk/blogs/mundo/cartas_desde_cuba/

Independent local blog by resident Uruguayan journalist, Fernando Ravensberg, describing life in Cuba originally hosted by the BBC World site BBC MUNDO and now independent at <http://cartasdesdecuba.com/>

6. BLOG: Voces desde Cuba (“Voices from Cuba”)

http://www.bbc.co.uk/mundo/temas/blog_cartas_desde_cuba

This is a new blog hosted by the BBC World site BBC MUNDO. A decision was made to replace the letters” website (see number 5 above) with a “voices” version in order to incorporate input from non-journalists. It is a rich source of first-hand accounts of daily life on the island, which “moves away from the usual political and economic news that dominates journalism about the island” and “seeks to give voice to critics of the revolution that receive no coverage in the Cuban media”.

7. Cubanet

<http://www.cubanet.org/>

A Florida-based site in Spanish which receives News from “independent” journalists in Cuba and gives them wider voice as an alternative to official Cuban sites

8. BLOG: Translating Cuba <http://translatingcuba.com/>

Translations into English of outlawed blogs from over 100 “independent dissident bloggers” based in Cuba

9. The Havana Times <http://www.havanatimes.org/>

A self-financed Nicaragua-based site in English and Spanish giving voice to local independent journalists and photographers in Cuba and expatriate Cubans “on a wide range of topics related to Cuba”

10. Havana Journal <http://havanajournal.com/>

An independent US-based site in Cape Cod, claiming to be “anti-Embargo and anti-Castro” open to independent contributors on Cuba

MAIN INTERNATIONAL NEWS AGENCIES

These have been selected on the basis that they have frequent news on Cuba, sometimes with resident foreign correspondents and with news bureaus on the island. They are a source of independent international views on events and life in Cuba, but they are monitored by the Cuba International Press Centre.

1. Reuters <http://www.reuters.com/>

Large UK-based international news agency with a resident correspondent in Havana

2. Associated Press (AP) <http://www.ap.org/>

The US”s major independent not-for-profit news cooperative based in New York, which claims “the highest standards of objective, accurate journalism”. AP has a news bureau in Havana.

3. **Agence France Presse (AFP)** <http://blogs.afp.com/focus/?tag/Cuba>
Third largest international news agency based in Paris with a blog on Cuba in Spanish
4. **Agencia Efe** <http://www.efe.com/efe/noticias/english/4>
Fourth largest international news agency based in Madrid with a resident correspondent in Havana. It claims “imparcialidad, credibilidad y rapidez” (impartiality, credibility and speed) in its news reporting.
5. **Agenzia Nazionale Stampa Associata (ANSA)**
<http://www.ansa.it/ansalatina/index.shtml>
A leading not-for-profit cooperative global news agency based in Rome with a dedicated website for Latin American affairs and a news bureau in Havana

MAIN INTERNATIONAL PRESS

There are numerous international broadcasters and media outlets that publish the main international news on Cuba. However, the following have been selected on the basis that they are frequent contributors to in-depth analysis of Cuban affairs, often with resident foreign correspondents on the island. They are a source of alternative international views on events and life in Cuba, but they are monitored by the Cuba International Press Centre.

1. **El País** <http://elpais.com/tag/latinoamerica/a/>
Spanish newspaper with resident correspondent in Havana. One of their correspondents was expelled by the Cuban authorities in 2011
2. **BBC** <http://www.bbc.co.uk/news/world-latin-america-19583447>
British news agency with resident correspondent. One of their correspondents was expelled by the Cuban authorities in 2007
3. **The Economist** <http://www.economist.com/sections/americas>
A special report on Cuba: <http://www.economist.com/node/21550418>
An informed source of analysis with regular in-depth analysis and summaries of Cuban affairs from a geo-political and economic point of view in its “Americas” section. It has no resident correspondent on the island and depends largely upon independent international observers or other journalists. Requires subscription.
4. **El Nuevo Herald** <http://www.elnuevoherald.com/noticias/mundo/america-latina/cuba-es/>
A Spanish language subsidiary of the The Miami Herald with a dedicated web portal to Cuban news
5. **The Huffington Post** <http://www.huffingtonpost.es/news/cuba/>

An independent US-based online news agency and blog with news sharing agreements with a number of leading international newspapers, including *The Guardian*, the *New York Times*, *Le Monde*, with a special section dedicated to Cuba

6. **The New York Times** <http://www.nytimes.com/pages/world/americas/index.html>

US based newspaper which regularly includes Cuban dissident blogger columnist Yoanni Sánchez http://www.nytimes.com/2014/12/19/opinion/yoani-sanchez-a-new-era-for-cuba-and-the-united-states.html?_r=0

7. **Le Monde Diplomatique** <http://www.monde-diplomatique.fr/recherche?s=Cuba>

A French-based monthly newspaper offering analysis and opinion on politics, culture, and current affairs, specialising in “authoritative journalism”

REPORTS AND WATCHDOGS ON CUBA

These sources provide an informative in-depth analysis on different aspects of Cuba’s policies and development by principal international agencies.

1. **US Department of State Report on Human Rights Practices: Cuba**

<http://www.state.gov/j/drl/rls/hrrpt/humanrightsreport/index.htm#wrapper>

An annual report on human rights practices in the world by the US State Department

2. **UK Foreign and Commonwealth Office Human Rights Report**

<http://www.hrdreport.fco.gov.uk/cuba/>

An annual report on human rights in “countries of concern” by the UK’s Foreign Office

3. **Canadian Foreign Service: Doing Business with Cuba**

http://www.canadainternational.gc.ca/cuba/commerce_international/index.aspx?lang=eng

Guidelines for Canadian companies doing business with Cuba. Canada has always retained diplomatic and business links with Cuba and have never participated in the US embargo.

4. **Amnesty International** <https://www.amnesty.org/en/countries/americas/cuba/>

An independent organisation, created in the UK, which campaigns for human rights worldwide

5. **Human rights Watch** <http://www.hrw.org/americas/cuba>

A US-based, non-profit, non-governmental human rights organization

6. **Transparency International Corruption by country: Cuba**

<http://www.transparency.org/country/#CUB>

An organisation whose vision is “a world in which government, politics, business, civil society and the daily lives of people are free of corruption”

7. **United Nations Human Development Report: Cuba**

<http://hdr.undp.org/en/countries/profiles/CUB>

The UN has a sizeable office in Cuba and places the island high on the human development index, which focuses on “the richness of human life, rather than simply the richness of the economy in which human beings live”.

8. Freedom House <https://freedomhouse.org/country/cuba#.VTu6liGqgko>

A US-based, “independent watchdog organization dedicated to the expansion of freedom around the world”

9. The Heritage Foundation <http://www.heritage.org/places/caribbean/cuba?ac=1>

The Heritage Foundation is a US-based “research and educational institution—a think tank—whose mission is to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense”.

10. Reporters without Borders <http://en.rsf.org/cuba.html>

An organisation, created in France, which seeks to “monitor attacks on freedom of information worldwide” through “two essential and highly specialised spheres of activity: one focused on Internet Censorship and the New Media, and the other devoted to providing material, financial and psychological assistance to journalists assigned to dangerous areas”.

11. Foundation for Human Rights in Cuba <http://www.fhrcuba.org/activism/>

A Miami-based, non-profit organization which promotes “a nonviolent transition to a free and democratic Cuba with zero tolerance for human rights violations” and seeks “to empower human rights defenders and activists who are working for change in Cuba through nonviolent means”.

12. US-Cuba Trade and Economic Council <http://www.cubatrade.org>

“Provides an efficient and sustainable educational structure in which the United States business community may access accurate, consistent, and timely information and analysis on matters and issues of interest regarding United States-Republic of Cuba commercial, economic, and political relations. The U.S.-Cuba Trade and Economic Council does not take positions with respect to United States-Republic of Cuba political relations. The organization is a private, not-for-profit, membership-based corporation that accepts neither United States government funding nor non-United States government funding.

APPENDIX D: PROCESS OF THEMATIC CODING

Step 1	Step 2	Step 3	Step 4	Step 5
Group data into categories according to frequency and intensity (sample)	Organise data according to previous research categories	Reduce data to sub-themes (sample)	Identify main underlying themes to explain the ethnographic context	Select case studies according to theme for presentation and analysis
1. What are the main challenges facing sojourners?		Demands and challenges		
<u>Everyday life</u> Settling in Setting up home Lack of essential goods Learning where things are Shopping for essentials Getting things done Moving around Unfamiliar living conditions Harsh tropical climate Adapting to schooling The informal economy Illegal vendors	General living adjustment (Black and Stephens, 1989) Non-work adjustment (Shaffer & Harrison, 1998)	<ul style="list-style-type: none"> ·Acute shortages of basic materials delayed settling and adjustment ·The informal economy dominated access to essential goods ·Sojourners formed networks to help each other ·The informal economy created inequality amongst Cubans ·Intercultural tension arose from different levels of access to goods and opportunism ·Illegal practices were common in society and created risk 	<u>Scarcity</u> created delay and stress in the adjustment process of sojourners and could create intercultural tension between sojourners and locals and could affect sojourner morale, which could inhibit full adjustment	Naomi: <i>"If there's cement, there's no sand...if there's cement and sand, there are no bags to put it all in!"</i> Maria: <i>"One for fish, one for meat, one for vegetables, one for wine"</i> Olaf: <i>"No hay problema"</i> Ben: <i>"Las mulas"</i>
<u>Authority</u> Communications restrictions Absence of foreign press and books Surveillance of diplomats High level of militarisation High level of policing Monitoring of communications Monitoring of movement Vulnerability of business sojourners Illegal TV and internet Illegal employment	Social control (Aguirre, 2002) Politically sensitive environments (Bell, 2013) The politics of the "gaze" (Foucault, 1977)	<ul style="list-style-type: none"> ·There was a general sense of control and surveillance though it was different for different groups ·Diplomats were more protected than business sojourners but had their movements monitored ·Contact between Cubans and expatriates was subject to monitoring ·The internet was restricted and monitored ·Most companies had to employ illegally ·Business sojourners had little legal recourse ·Some Cubans had more freedom 	<u>Surveillance and control</u> created a sense of fear and vulnerability amongst sojourners and potential animosity towards the local context	Carol: <i>"Everyone has to be careful with what they say"</i> Pepe: <i>"Es tolerado, pero no es legal"</i> Miguel: <i>"Everything and everyone is controlled in Cuba"</i> Diplomats (Luigi, Mario, Albert): <i>"La franquicia"</i>
"Cultural differences" Dual economy Illegal working Working for foreigners Bureaucracy Tourism Exploitation Opportunism	Work adjustment (Black and Stephens, 1989) The "Tourist Gaze" (Urry, 2002) "Exoticisation" (Holliday et al, 1994)	<ul style="list-style-type: none"> ·Sojourners felt compassion for locals and the challenges they faced ·Locals could be exploited for their need for greater earning power ·Sojourners presented opportunities for locals because of their greater spending power 	<u>Inequality</u> of access to goods caused tension between different groups (sojourners, locals, CP members), which affected the adjustment process and inhibited sociocultural adjustment amongst sojourners	Kim: <i>"Sacrificio y paciencia"</i> Amy: <i>"The drama of everyday life!"</i> Simona: <i>"Siempre hay uno del partido"</i> Manuel: <i>"Relationships are everything in Cuba"</i>

Exoticisation		<ul style="list-style-type: none"> ·Some Cubans were protected by special privileges ·Cubans monitored each other ·Authorities called for sacrifice and constant vigilance, citing imperialism ·Tourism created both opportunity and inequality ·The presence of foreign companies distorted the employment market 		Juanito: <i>"El turismo nos da vida, pero nos mata, también"</i>
<u>Personal life</u> Giving up career Loss of support networks Low self esteem Social isolation Role change Family and spouse Networking Social segregation	Role adjustment (Lazarova et al, 2010) Crossover and spillover stress (Haslberger and Brewster, 2008) Psychological adjustment (Ward et al, 2001) The Trailing spouse (Harvey, 1998)	<ul style="list-style-type: none"> ·Lifestyle challenges created emotional problems ·It was difficult to meet people ·It was difficult to stay in touch with support home networks ·There was greater onus on family and the spouse ·Expatriates brought closer together through segregation ·Psychological adjustment became salient ·Crossover and spillover stress was marked between domains and individuals ·Individuals reacted differently and more or less positively 	<u>Lifestyle and role change</u> in the context of Cuba made adjustment more challenging and affected morale more acutely, because of restrictions and insularity	Elke: <i>"I'm struggling to find a role"</i> Paola: <i>"It's the spouse that takes the brunt"</i> Eva: <i>"I feel isolated"</i> Elisa: <i>"Looking after my family is my job!"</i>
2. How do they deal with them?		Adjustment strategies		
<u>Social support</u> Information Assistance Companionship Emotional support Institutional support	Social support (Adelman, 1988; Ward et al, 2001)	<ul style="list-style-type: none"> ·Large companies and embassies provided more support ·There were differences in levels of support ·Support could inhibit sociocultural adjustment ·Lack of support meant that personal resources became key ·Diplomatic status advantageous in dealing with bureaucracy 	<u>Institutional resources</u> were important to overcome obstacles, but could inhibit sociocultural adjustment	Irina: <i>"I couldn't manage without all this help"</i> Marc: <i>"There's no support"</i>
<u>Individual differences</u> Language ability Previous experience "Culture distance" "Open-mindedness" "Tolerance of difference" "Intercultural competence" "Positive attitude" Expectations Cross cultural training	Individual differences (Aycan, 1997; Ward et al, 2001; Mohr and Klein, 2004) Culture distance (Babiker et al 1980; Ward and Searle, 1991) Expectations and cross cultural training (Caligiuri et al, 1998)	<ul style="list-style-type: none"> ·Language ability was important ·Previous experience helped ·Positive attitudes helped ·Personal resources could speed up adjustment ·Personal resources made sociocultural adjustment more likely 	<u>Personal resources</u> were important to overcome obstacles and could speed up the adjustment process, particularly where institutional resources were lacking	Ricardo: <i>"You have to be positive and open!"</i> Marta: <i>"Spanish is essential!"</i> Carlos: <i>"We are enjoying Cuba!"</i>

	Intercultural communicative competence (Byram, 1997)	·Personal resources could compensate for lack of support from work organisations		
<u>Social life</u> Building networks Sense of "community" "Expatriate community" "School community"	Social interaction adjustment (Black and Stephens, 1989) Social network theory (Granovetter, 1973)	·Social networks replaced lost support networks after relocation ·There was a strong sense of helping each other out, particularly in times of crisis ·Socialising stronger than at home and people closer together ·Segregation strengthened networking amongst sojourners ·Some Cubans were allowed to have contact with sojourners ·Networks helped psychological adjustment	<u>Social network building</u> enabled sojourners to develop support and companionship for psychological adjustment and to adjust socioculturally in a segregated and insulated context, which helped them overcome obstacles and crises	Juana: <i>"What helps? Meeting people!"</i> Valentina: <i>"Everyone knows everybody's business!"</i> Jaime: <i>"We all club together"</i> Afrina: <i>"I felt lonely"</i>
<u>Contact with locals</u> Relations with locals Relations with co-nationals Relations with work-colleagues Expatriate "enclavism"/ "ghettoism"	Sociocultural adjustment (Ward et al, 2001) Social Identity Theory (Tajfel, 1982) Enclaves/ghettoes (Aycan 1997; Selmer and Lauring, 2009)	·Segregation and control limited free contact with Cubans ·Contact with Cubans largely transactional ·Segregation and control encouraged enclavism ·Enclavism inhibited sociocultural adjustment ·Strong sense of national identity created tension with those who wanted sociocultural contact ·Individuals reacted differently and were more or less open	<u>Sociocultural adjustment</u> was largely limited to sporadic, tolerated contact with local Cubans, because of social control, and rarely resulted in full "adaptation" over time	Monique: <i>"It's hard to get to know Cubans"</i> Leila: <i>"It's up to you!"</i> Ursula: <i>"They criticise me for breaking ranks"</i> Joan: <i>"You have contact with people that are allowed to have contact with you"</i>