

# Remittances and morality: family obligations, development, and the ethical demands of migration

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## Abstract

Remittances have moral dimensions that, albeit implicitly addressed in migration literature, have not yet been the focus of explicit attention and analysis by social scientists. Building on recent developments in the anthropology of ethics and morality, this article proposes theoretical and analytical pathways to address this important but often neglected aspect of remittances. It does so mainly via a critical analysis of existing scholarship on remittances, and ethnographic data drawn from research among Cuban migrants in Cuba and Spain. The reflexive scrutiny of scholars' moral assumptions about remittances opens the way for the study of the moral dilemmas and ethical demands articulated by remittance senders and recipients. Family roles and obligations, and the uses of the money sent by migrants, are identified as key areas of moral difficulty. Their analysis shows how remittances inform moral reassessments of family relations, individual responsibility, economic practice, and development. The notion of 'moral remittances' is proposed as a heuristic comparative tool that serves to illuminate the moral aspects of remittances. This notion is put into perspective to complement and reconsider more metaphorical takes on remittances, notably the concept of 'social remittances', of which it helps reveal some epistemological limitations while opening future research avenues.

## Keywords

Remittances; ethics and morality; Cuban migration; family obligations; economic expectations; development

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## Remittances, moral reflexivity, and the analysis of moralities

This article calls for an explicit engagement with the moral aspects of remittances in the study of migration and proposes some analytical tools and pathways to do so. The notion of remittances is commonly used to refer to money transfers from migrants to relatives, friends, communities, and local governments in the country of origin, with such transfers constituting ‘one of the many transnational flows that link movers and non-movers and sending and receiving communities through complex social and cultural ties’ (Cohen 2011:104). Our reflections in this article build on current developments in the anthropology of ethics and morality, and we start by making an epistemological case for scholars to increase awareness and reflexivity of their own moral baggage and assumptions when investigating remittances<sup>i</sup>. In doing so, we follow the reflections of Fassin (2008) on ‘moral anthropology’ and Zigon’s (2007, 2008, 2009, 2010) theoretical proposal for ‘an anthropology of moralities’. The call for moral reflexivity, as articulated by these authors, paves the way for our main contribution, which moves the analytical focus from scholars’ moral views on remittances, towards the moral dimension of remittances as articulated by our interlocutors. Our argument draws on several examples from recent literature on remittances as well as first order data from Simoni’s research among Cuban migrants.

Remittances are usually considered a strategy of economic diversification for households; they may improve living conditions (including health and education), create economic opportunities, and diminish poverty (de Haas 2007; Monsutti 2008; Cohen 2011). Scholars also highlight ‘negative’ effects, like dependency, increasing inequalities (between households with migrants and those without), or price inflation (ibid.). Reflections on remittances are often embedded in broader discussions of the links between migration and development, and a wealth of publications helps refine our understanding of such entanglements (e.g. Binford 2003; Cohen et al. 2005; Maimbo and Ratha 2005; de Haas 2007; Monsutti 2008; Glick Schiller and Faist 2010; Eckstein 2010a; Cohen 2011; Eversole and Johnson 2014; Lacroix 2016). Assessments of the links between remittances and development bring to the fore moral judgments and normative evaluations, whether remittances’ impact is optimistically judged to be positive, pessimistically negative, or a mixed blessing. This, we argue, should be reason enough to encourage attention to the moral dimensions that are often implicit in scholarly assessments of remittances and, more broadly, to the moral aspects of remittances.

As Faist (2010) and other authors remark (e.g. de Haas 2007; Carling 2014; Eversole and Johnson 2014), much of the nature of academic assessments of the ‘impact’ of remittances – positive/optimistic or negative/pessimistic – depend on whether scholars question or take for granted the broader epistemological and structural assumptions permeating policy-oriented research and initiatives. For de Haas (2007), researchers and policy makers may ‘tend to project their own norms, preferences and expectations—for instance, on appropriate styles of consumption, housing and investments—onto the communities and societies that they study’ (2007:2). Our first call in this article is thus for scholars to become more aware and reflexive of the moral presuppositions projected when framing research topics and deciding on analytical priorities (see Dahinden 2016). Once we do this, we are better positioned to grasp the moral views of our participants and make these the explicit focus of analysis. Advocating ‘moral reflexivity as part of our research activity’ (Fassin 2008:341), we recognize the merit of pursuing a social science that ‘has as its object the study of

moral issues posed to societies or which societies pose to themselves' (ibid.) – remittances being, in this article, the issue at stake.

The 'moral anthropology' proposed by Fassin (2008) is 'not an anthropology which proposes its own morality', but one that 'attempts to render visible and intelligible moral issues in a cultural, and consequently historical, context' (2008:341). Moving beyond a simplistic distinction between scholars' moral assumptions on the one hand, and those of our participants on the other, we acknowledge that we all are, by our very nature as human beings, embedded in moral assumptions and values. This becomes all the more evident, and subtle at the same time, once we deploy what has been considered to be one of the key insights of the recent attention to morality in anthropology, namely the recognition that people are situated at the crossroads of a range of (often competing) moral discourses and demands (see in particular Schielke 2009; Zigon 2010; Laidlaw 2014; Mattingly 2014). This insight helps us overcome totalizing views of morality that, since the work of Durkheim (1953), tended to see the moral and the social as coterminous (see Laidlaw 2002; Zigon 2007:134). For Zigon, all social contexts are defined 'not by one morality' but rather by a 'moral assemblage' resulting from the combination of 'various institutional, public, and personal moral discourses and ethical practices' (2010:5).

Institutional moral discourses stem from formal entities wielding 'varying amounts of power over individual persons' (2010:6). In relation to migration, we may think of the discourses conveyed by nation states, the World Bank (WB), or the International Organization for Migration, but also religious institutions working with migrants, NGOs, and so on. Public discourses of morality reassemble 'all those public articulations of moral beliefs, conceptions, and hopes that are not *directly* articulated by an institution' (Zigon 2010:7), telling examples being 'the media, protest, philosophical discourse, everyday articulated beliefs and opinions, the arts, literature and stories, parental teachings' (ibid.). The third aspect is that of morality as embodied dispositions, which Zigon conceptualizes drawing on Mauss's (1973) notion of habitus – 'the unreflective and unreflexive dispositions of everyday social life attained over a lifetime' (2010:8) – and its reassessment and further elaboration by Mahmood (2005).<sup>ii</sup>

In what follows, we put to fruition Zigon's theorization of 'moral breakdowns' (2007, 2008, 2010) drawing attention to those key 'ethical moments' in which remittances raise moral dilemmas leading to self-reflection and justification, and to the explicit (re)articulation of remittances' meanings and implications. This enables us to highlight the role of morality in driving, informing, and shaping remittances, and to show how remittances, in turn, also affect moralities. For Zigon, 'moral breakdowns' and 'ethical moments' occur 'when some event or person intrudes into the everyday life of a person and forces her to consciously reflect upon the appropriate ethical response' (2009:262). In those moments, an explicit analysis of moralities-in-the-making becomes possible and most productive<sup>iii</sup>. Drawing on the Cuban case and on comparative scholarship, we thus focus on moments in which remittances generate moral breakdowns. The analytical pathway we delineate is also conducive, following Robbins (2009) more structural approach to morality, to identifying the key areas of moral difficulty that are linked to remittances. Accordingly, we uncover and address two such areas of problematization, related to transnational family obligations, pointing to a moral imperative to remit, on the one hand, and to the divergence in expectations as to the 'proper' use of remittances, pointing to a moral imperative to spend remittances wisely, on the other. We finally introduce the notion of 'moral remittances', putting it into perspective with the notion of 'social remittances' and other metaphorical

uses of remittances inspired by Levitt's (1998) scholarship, and illustrating the broader insights that the attention and approach to morality we advocate can generate for our understanding of migration, its workings, and effects.

To empirically ground our reflections, we draw from Simoni's research in Cuba and Spain with Cuban migrants and their families. Fieldwork in Cuba took place between 2005 and 2020, for a total of 20 months, and while originally focused on informal encounters in the realm of tourism (Simoni 2016a), gradually included Cuban migrants who were back on the island, whether for a short visit, or more permanently (Simoni 2015, 2019a, 2019b). Since 2012, fieldwork in Cuba has been complemented with regular stays in Barcelona to undertake research among Cuban migrants (Simoni 2015, 2016b, 2019a, 2019b), totaling four months as of 2019<sup>iv</sup>. While remittances were not the key focus of Simoni's research, they came into the picture insofar as they became an important subject of debate among his interlocutors<sup>v</sup>. Since the scope of our contribution is eminently comparative and heuristic, we build extensively on the work of other authors who have dealt with the moral dimension of remittances, albeit not explicitly framing their reflections in terms of morality. Joining the Cuban case with that of scholars working in other parts of the world, we show how an explicit focus on the moral dimension of remittances, aided by recent developments in the anthropology of ethics and morality, can improve our understanding of how remittances function and what is at stake in them, and simultaneously shed new light on key areas of moral difficulty and change which migration brings into play.

## Family obligations and moral breakdowns

Migration scholarship shows that remittances are essential for affirming, performing, (re)producing, and (re)shaping social relations. Usually involving people who know each other (relatives, friends, community members) and are already socially connected before migration, remittances are affected by and shape the very definition and contours of who counts as 'family', which may vary extensively (see for instance Glick Schiller and Fouron 2001; Goldring 2004; Smith 2006; McKay 2007; Lindley 2009; Åkesson 2011; Olwig 2012; Pribilsky 2012; Abranches 2014; Carling 2014; Gardner 2015; Katigbak 2015; Coe 2016; Herrera 2017; Garbin 2019; Zharkevich 2019). They also connect non-kin, such as religious communities (Garbin 2019) or other social formations (cf. Goldring 2004 on 'collective remittances', Lacroix 2016 on hometown organisations as development actors or Smith 2006 on political life in the place of origin), as in cases where money is explicitly designated to support the poor in one's village (cf. Carling 2014; Gardner 2018 on Muslim charity), or disaster-affected relatives or neighbours (cf. Dalgas 2018). Remittances are thus a way to maintain and (re)create links as well as to fulfil an appropriate role and relation, often imbued with strong feelings and connotations of moral duty. Research has shown the importance of feelings and emotions in the upholding of transnational networks (McKay 2007; Conradson & McKay 2007; Christou 2011), and the study of remittances can no doubt deepen our insights on the entanglements between emotions and morality (Throop 2012; Cassaniti 2014) in migration<sup>vi</sup>.

The sending and receiving of remittances is prone to engender explicit moral questions and demands about who we are as social beings and what our values and priorities are, our ensuing obligations or expectations in relation to significant others (i.e. family), and the procurement of money and its appropriate use. Given the range and potential depth of such questions, it is not surprising that moments of disruption to the expected

flows of remittances and their 'normal' functioning prompt moral breakdowns and call for ethical moments of reflection and renegotiation. Simoni's fieldwork among Cubans in Barcelona took place at a time when migrants were suffering the effects of the 2008 financial crisis (Valero-Matas et al. 2014). Several Cuban interlocutors were jobless or only working part-time, often in precarious and badly paid positions, and this impacted the flow of remittances back to Cuba (see also Berg 2011:150). Notwithstanding such economic difficulties, the continued sending of remittances tended to be seen as 'the right thing to do': it remained an imperative and a duty towards one family (see also Eckstein 2010a:1661), and a clear marker of moral worth. 'Of course I send my family money, every month!', was the frequent reply when people were explicitly asked about their remittances, making the question seem out of place. What was exceptional was not sending any money back home, a behavior that often called for an explicit justification. Indeed, remittances spontaneously came forth in conversations, unsolicited by the ethnographer, only when something interrupted the 'normal' monthly flow of cash from migrants to their relatives back in Cuba, such as the impossibility or, more rarely, the unwillingness (see the example below) of sending remittances or of transferring the 'right' amount with the expected regularity. Any such disruption generated 'moral breakdowns' and 'ethical moments' (Zigon 2007) of self-reflection, problematization, and justification in which the nature of family ties and the very notion of family were potentially worked over.

During Simoni's last stay in Cuba in February 2020, Raymon<sup>vii</sup>, a Cuban man in his forties who had been living in Norway for thirteen years and was back on the island on a short holiday, questioned commonly held assumptions about the obligation to send remittances back to family:

They say that you *have to* give it all to your family, that you have to help your family and give them your money. And if you don't do it, they say you are *malo* (bad). They are crazy... So, *I have to* work in Europe, and all my savings I have to gift them (*regalárselos*)? Then you give them the money [Raymon had remitted significant monthly amounts to his mother and sister for over ten years], and they just sit on their asses, and they don't do a thing...

Raymon was fond of Biblical parables condemning idleness and lack of goodwill, and such newly acquired religious precepts informed his ethical deliberations on family duties and responsibilities. Logical reasoning also led him to criticize prevailing views of remittances as unconditional obligation, mostly the notion that you *had to* send money to family. Such view, articulated by his mother and sister, Raymon exposed as *incoherente*, incoherent, and contradicting principles of reciprocity and deservingness. His mother and sister had disappointed him, their ungratefulness and deceptiveness most clearly exemplified by the occasions in which they had gone as far as stealing from Raymon's valuables when he visited. He had had enough. As he cut ties and stopped sending money, Simoni sensed he felt the need to elaborate on his reasons, relying on the Bible or abstract logic to do so, and trying to rally support among his friends and with the ethnographer, acting here as a sympathetic listener. This reveals how much such decision absorbed him and its potential contentiousness in the face of other Cubans, some of whom claimed that no matter their behavior, one's parents, and more particularly one's mother, always deserved unconditional help<sup>viii</sup>. Coping with societal pressure and the sense of guilt required much effort and led Raymon to mobilize moral principles he deemed superior, allegedly learned 'over there' (*allá*), in Norway.

The physical separation of family members, engendered by the very phenomenon of migration, is in itself prone to generate moral breakdowns, raising questions as to how to 'properly' fulfil one's role and obligations towards relatives left behind. Remittances provide some answers to those questions, serving to delineate how 'good' relatives ought to behave (cf. e.g. McKay 2007; Åkesson 2011; Katigbak 2015; Hannaford 2016; Lacroix 2016; Zharkevich 2019). Yuslaidy, a young Cuban woman that had to leave her new-born daughter behind when she first came to Spain, emphasized the great sacrifices she made to send remittances to her mother to provide for her baby in Cuba. Faced with a situation that could easily engender moral reprobation, Yuslaidy was striving to enact the 'good mother', both to gain a sense of self-worth, and to seek other people's approval. In her work among migrant women from the Caribbean island of Nevis, Olwig (2012) similarly uncovers 'gendered narratives reflecting dominant social and moral values' (2012:831), showing that these women 'operated with the image of the good mother, daughter, sister, or aunt who migrates for wage employment' to be able to 'send remittances back home and thus help the family' (2012:831). Lily, a Cuban woman in her forties who had spent over twenty years in Spain and had recently come back to live in Cuba, poignantly recounted her unexpected disillusionment with her family upon her return. Praised as 'the good daughter' and 'the good sister' when she was in Spain and sending monthly remittances, her decision to return had generated much discontent, notably as it marked an end to the flow of hard currency. Being and sending money from abroad informs in this case the assessment of the 'good' relative and shows how the moral dimension of remittances can actively contribute to shape migratory flows<sup>ix</sup>. This was made clear by other Cuban interlocutors in Barcelona who, facing a difficult economic situation and pondering a possible return to Cuba, ultimately decided against it, reasoning that no matter how hard their migrant life was, such sacrifice (*sacrificio*) enabled them to send at least a bit of money to their dear ones in Cuba and thus fulfil family expectations. As the above examples illustrate, uncovering the moral dimension of remittances enables us to reflect on the differential strength of various family ties, their power dimensions, and how much migration reproduces, reinforces, or alternatively challenges normative prescriptions, potentially changing the very nature and conceptualization of what makes a family.

Another insightful case that can be fruitfully illuminated via notions of moral breakdown, ethical work, and the ensuing reconfiguration of gendered family roles is provided by Coe (2016:40), who shows how it has progressively become 'normal' for adult women from southern Ghana to migrate in order to provide remittances and delegate care for children and elderly people to other women left behind. While the expectation becomes for these women to come back in the future to fulfil in person their caregiver role, some with decent earnings decide to stay in the US or Europe, competing this way with male roles and raising a range of dilemmas that call for further ethical renegotiation of one's role and subjectivity. As argued by Katigbak (2015) –in the case of transnational Filipino families–, and by Hannaford (2016) and Zharkevich (2019) –in the cases of married couples from Senegal and Nepal respectively– money can work as a sign of care, love, and intimacy that becomes indispensable to maintain and reproduce kin relations (cf. also McKay 2007; Åkesson 2011; Herrera 2017 and, more broadly on money's entanglements with intimacy, Zelizer 2005). Any decrease or irregularities in the remitted amount, or any failure or unwillingness to remit, can thus lead to suspicion and controversies about the 'good' way of fulfilling one's family role, or even to a breach in the relation, as was the case for Raymon and Lily (cf. Åkesson 2011; Carling 2014; Hannaford 2016; Scalettaris et al. 2019; Zharkevich 2019)<sup>x</sup>. Another relevant case is when migrants' projects and aspirations change over time and start privileging the

satisfaction of more individual desires (e.g. desire for personal material goods or to undertake studies), a process that may lead to a decrease in the remitted money and also give rise to moral breakdowns and conflicts (cf. e.g. Pribilsky 2012; Meloni 2020; Scalettaris et al. 2019). Having addressed the ethical demands of remittances as a duty and family obligation, we now turn to moral controversies on their 'proper' use, including the competing understandings of 'development' they help reveal.

## Diverging expectations and moral controversies on development and the use of remittances

Among Cuban migrants, Simoni could detect frequent moments of moral difficulty that had to do with expectations on the use of remittances by families back home. A key preoccupation was that the relative receiving the remittance could be trusted in making 'good' use of it. Here is where explicit moral judgement and deliberation intervened, in terms of delineating what such 'good' use meant and of getting the message across to relatives in Cuba (cf. Hannaford [2016] on similar debates on the use, by Senegalese women, of their husbands' remittances). Take the example of Abde, a Cuban man in his forties that Simoni first met in Barcelona. When encountering him again in the summer of 2018 in the streets of Havana, Abde looked anxious and frustrated about his current situation, and immediately started complaining about the misuse that his family had made of the remittances he had been sending from Spain, in the two decades he had lived there. During such time, Abde had been sending thousands of Euros, giving his relatives clear instructions as to how the money ought to be used. The main advice was to buy property in prime locations that could gain value and prove ideal for the opening of recently licensed private businesses, such as a small restaurant (*paladar*) or a guesthouse (*casa particular*). Upon returning to Cuba after years of absence, Abde had been dismayed to find that all the money he had sent had been mismanaged, allegedly 'wasted' in parties and celebrations. 'Nothing' was left of it, and the only thing his family bought was what he described as a tiny ugly house, in an inconvenient location, to which he had no access, and where his sister now resided.

A rather common narrative Simoni heard both in Cuba and Spain, saw migrants sending substantial remittances to their close relatives to 'advance' and improve their overall conditions – for instance to undertake overdue repairs on the house or set up a small business – only to find out, upon visiting Cuba a few years later, that 'nothing' had allegedly been done, that construction work had been badly managed, that the bulk of the money had been spent, or 'wasted', on something else. It is useful to contextualize these findings with scholarship exploring changing remittances' patterns in Cuba during the last decade, and the growing mismatch between migrants' expectations on the one hand, and the use of remittances by relatives back in Cuba on the other – a mismatch conducive of amplifying moral debates on the 'proper' use of remittances. Based on research prior to 2010, García-Moreno shows that the vast majority of what was remitted by Cuban migrant women in Spain to their family went towards the satisfaction of basic needs, notably the purchase of food (2011:365, 366), indicating shared understandings of what remittances were to be used for (a similar case for the use of remittances during wartime in Somalia is found in Lindley 2009:1325). The situation appears somewhat different ten years after<sup>xi</sup>. Hansing and Orozco (2014) tackle remittance's impact on small business development, showing that the growing aspiration to set up businesses is often matched by a certain inability to make them viable or grow beyond 'subsistence level'. What matters for us here is

that diversification in the potential uses of remittances (Morales 2018), or at least the perception of it, opens up further possibilities for Cubans, in Cuba and abroad, to debate and assess the 'appropriate', 'good' use that should be made of the money sent back. It is in this structural context of perceived opening opportunities that the moral accusations migrants addressed to their relatives, of 'wasting' their hard-earned remittances, must be situated and understood.

What is at stake, and what contributes in our view to amplify moral controversies on remittances, is the divergence between migrants and their families in terms of imagining horizons of possibility (Crapanzano 2004, Appadurai 2013) for the use of remittances. Migration has been said to act as 'a technology of the imagination, as an act through which people come to imagine better lives' (Vigh 2009:94) and 'attempt to move forward' (Kleist and Jansen 2016:380). What such 'move forward' comes to mean in a given societal context is then what merits attention. In the Cuban case, migrants' aspirations for the use of their remittances seemed increasingly aligned to globally circulating institutional and public moral discourses on migration. One such notion is that migrants ought to contribute to visible and noteworthy improvement and 'development' back home (cf. Glick Schiller and Faist 2010; Carling 2014), a marker of 'success' in migratory contexts across the world being, for instance, the construction of a house or the opening up of a business (García-Moreno 2011). It was precisely such expectation to 'move forward' and mark a significant difference back home – especially once the economic conjuncture in Cuba was deemed improved and rife with business opportunities – that created accrued hopes and a related concern for the 'proper' use of remittances. In line with dominant moral narratives on migration and its (development) goals, the migrants' trajectories and efforts conjured prospects of upward social mobility. What was the point of going to such trouble – i.e. migrating – one could ask, if it was just to see one's family 'staying still', not 'moving forward', having just enough to survive, with no substantial difference from when one had left?

For relatives back in Cuba, horizons of possibility could be more short term and remain anchored in less optimistic perceptions of relative 'stuckedness' (Hage 2009), which could in turn justify a more mundane use of remittances to simply live a little better, satisfy everyday material needs, and afford perhaps occasional moments of celebration and 'joyful consumption' (Garth 2019:10) when such needs had been met. Informed by more 'ambitious' aspirations, the migrants sending remittances could criticize as short-sighted such prosaic uses, which frustrated their expectation to make a more visible, substantial, and longer-term impact on the lives of families in Cuba. The enduring political economic conditions of crisis in Cuba were certainly not aiding in materializing visions of socio-economic mobility (see Hansing and Orozco 2014), but rather than focusing their critiques on such structural conditions, the migrants' moral reprobation of remittances' use tended to target their direct beneficiaries, i.e. their families, putting the blame on their mismanagement of money. What could thus be seen as a primarily political economic issue was turned into an issue of individual responsibility and a moral criticism of failed economic behaviour (see Simoni 2016b). These moral narratives of reprobation often acted as a broader criticism of Cuban ways of living and managing economic life and crisis on the island. 'Cubans [in Cuba] don't know what work is', 'If you give them 50 [convertible pesos, the hard currency and US dollar equivalent on the island], they might spend them right away, in food and drinks, throwing a party!', 'People don't know what saving means, they just think one day at a time, and tomorrow "we'll see"' – such were the kind of moral condemnations Simoni



heard among migrants, complaining about the 'bad' use that was made of their remittances.

Drawing on the work of Thompson (1971, 1991) and Scott (1976), such moral condemnations of economic practices may be approached as delineating specific 'moral economies'. For Thompson (1971, 1991), situations of change and rupture (in his study the arrival of the 'free market' in eighteenth century England, but we may think of migratory situations such as the one described here) are moments in which explicit questions are raised as to the functioning of economic life and people's rights and obligations towards one another. This is what summons a moral economy 'into being' (Thompson 1991:340). Moral economies are thus reflexive and explicit responses to moments of conflicting co-presence of different economic models and frameworks of expectations<sup>xii</sup>. A fruitful body of research deploys the notion of 'moral economy' to analyze aspects of migration related to transnational family and/or community expectations and obligations, notably in regard to remittances (see Velayutham and Wise 2005; Isabaeva 2011; Garbin 2019; and the review in Scalettaris et al 2019). While partly overlapping with this scholarship, our approach aims to complement it by advocating a deeper engagement with current theoretical insights in the anthropology of ethics and morality. The latter, we argue, can be particularly helpful to clarify, refine, and delimit uses of the notion of the moral economy, encouraging more empirically grounded elucidations of what exactly counts as 'moral' and as 'economic' in a given context, and thus obviating the risk of metaphorical deployments of the concept that can overly dilute its analytical purchase (see Simoni 2016b)<sup>xiii</sup>.

Moving from these conceptual debates on the moral (in the) economy to a reassessment of the links between remittances and 'development', it is first of all noteworthy that, in the Cuban cases Simoni investigated, little reference was generally made to the remittances' contribution to the development of the country as a whole. What prevailed, instead, were concerns for an increasingly nuclearized family (cf. in other geographical contexts, e.g. Zharkevich 2019) and one's immediate intimate relations (see Simoni 2019a), as noted also by Berg's interlocutors, who 'felt loyal to their families with whom they shared economic hardship and changes, but not to the nation' (2011:153). Recent research on remittances in Cuba draws attention to their current changes and heterogeneous effects (González-Corzo and Larson 2006; Duany 2007; Eckstein 2010a, 2010b; Blue 2013, Hansing and Orozco 2014; Hansing and Hoffmann 2019), which include the 'inherent tension between state and societal interests in remittances' (Eckstein 2010b:1047). Eckstein shows remittances' potential to upset a range of precepts of Cuba's 'socialist political-economy' and 'state-sanctioned normative order' (2010a:1652), such as the ideal of subordinating 'private to state accumulation' (2010b:1048), listing among the consequences the erosion of revolutionary principles of equality and hard work, and the rising of illegalities, consumerism and individualism. Her research illustrates 'how and why a full understanding of remittances rests on examining dynamics at both the individual, societal, and institutional, state level' (Eckstein 2010b:1047), including their changes over time. It thus supports our insistence on the importance of contextualizing moral assessments of remittances, working against simplistic readings of remittances' 'impact on development' that posit a unified and taken for granted view both of development and of people's interests, and neglect the subtler lines of controversy that remittances may generate in a given societal context.

In the course of Simoni's field research, when references were made to migrants' contribution to 'the country', in general, it was often as a reaction to the questioning

and mistreatment they perceived at the hands of the Cuban state, which they accused of being ungrateful and of treating them unfairly (see Simoni 2015, 2019a). It is the context of enunciation, accordingly, which helps understand the nature and purposefulness of their moral reasoning. Upon their arrival at Havana's airport on a visit to Cuba, for instance, the unsympathetic and hostile attitude of immigration authorities could challenge the migrants' sense of belonging and allegiance to Cuba, questioning their concern for the country. Countering such challenges, and in direct response to the ethical demand these posed, migrants could purposefully highlight their broader contribution to Cuba's economic recovery and development: how their remittances were serving to inject much needed money into the country, to repair derelict houses, to feed residents and redress a range of economic problems the socialist government had proven unable to solve. Here is when their narratives most closely approximated the 'migration-development mantra' (Glick Schiller and Faist 2010), with migrants claiming to be developing Cuba and making crucial steps to bring it in line to other 'normal' developed countries. Such references actualized hegemonic moral discourses on development, aligning the migrants' narratives to powerful, globally circulating accounts linking migration, remittances, and development. Such narratives did not, however, seamlessly converge with the institutional discourses of authorities in Cuba, whose ideal view of remittance's uses and effects could outline different paths for the development of the Cuban nation, based for instance on ideals of revolutionary collectivism and generalized wealth redistribution (see Eckstein 2010b).

In the range of examples explored in the two last sections, from the enactment of the 'good' relative and redefinition of family roles, to the complaints about remittance misuse and mismanagement, to contentious claims on Cuba's paths to development, we can clearly identify the moral dimension of remittances and their far-reaching ramifications. Accordingly, remittances became entangled with broader moral reassessments of notions of family, family roles, and familial duty; of individual responsibility, economic behaviour and rationality; and of distinct visions of development itself. Starting with Levitt's (1998) notion of 'social remittances', the next section considers the more metaphorical approach to remittances her scholarship inspires. A reflection on the heuristic concept of 'moral remittances', enables us to clarify the scope and limits of such metaphorical takes, and reveals the interest of extending the analytical pathways proposed in this article beyond the study of remittances towards a broader scrutiny of the moral assemblages that inform, and are in turn shaped by migration.

### From social remittances to moral assemblages

In a groundbreaking contribution, Levitt (1998) conceptualizes 'social remittances', beyond transfers of money, as 'the ideas, behaviors, identities, and social capital that flow from receiving- to sending country communities' (1998:926). Her interest is in the impact of such remittances on social and political life in emigration countries, where social remittances form part of a theory of 'cultural diffusion'. Levitt's work has paved the way for the proliferation of new notions and inflections of 'remittances', in some cases bearing only a semblance of the original concept linked to the transfer of money. Notions of 'political remittances' (cf. Tabar 2014; Lacroix, Levitt and Vari-Lavoisier 2016; Krawatzek and Müller-Funk 2020), 'cultural remittances' (Flores 2009), 'professional remittances' (Sun 2016), 'emotional remittances' (Katigbak 2015),

'reverse remittances' (non-monetary counter-gifts to migrant remitters' money; Mazzucato 2011), have thus emerged in migration studies. In these cases, as in the work of Levitt, the term 'remittances' is used in a metaphorical way, referring to an array of phenomena (cf. Boccagni and Decimo 2013). While monetary remittances usually involve people spatially separated, metaphorical remittances feature encounters between those who stayed and (temporary) returnees. The latter bring back with them skills, ideas, or objects (and possibly also money to invest), which have an impact in their country of origin (cf. e.g. Levitt 1998; Flores 2009; Conway et al. 2012; Lacroix, Levitt and Vari-Lavoisier 2016; George 2017)<sup>xiv</sup>. Levitt (1998) discusses three types of 'social remittances': 'normative structures' (that is, 'ideas, values, and beliefs' [933]), 'systems of practice' ('the actions shaped by normative structure' [934]) and 'social capital' (prestige and status acquired in migration context transferred to family members in the homeland [935]).

As we can see, the moral dimension already plays an important role in the notion of social remittances and its offshoots, highlighting the transfer of values and moral ideas from immigration to emigration countries, particularly through the discourses and practices of returnees. What may the notion of 'moral remittance' add, we could ask, in this already (over)crowded conceptual landscape? First of all, let us clarify that moral remittance ought not to designate a 'type' of remittance, but rather the moral aspects that traverse all remittances. On the one hand, an explicit focus on morality, notably building on the theoretical approach outlined in this article, may provide subtler analytical insights when the migration-linked transfers scholars identify have an explicit moral dimension and clear-cut directionality, as already illustrated in some of the cases above. On the other hand, the lessons of the anthropology of ethics and morality can also provide a corrective to metaphorical takes on remittances, pointing at some of their limitations and potentially reductive epistemological biases, such as overly simplistic equations between person, society and/or culture, and morality.

Considering first the explicitly moral dimension of some such 'social remittances' – what we may conceptualize as 'moral remittances' – in the Cuban case we can refer to the ascendancy that new ideas of economic behaviour and entrepreneurship brought by migrants that return to Cuba may have on their relatives, friends, and acquaintances. As shown elsewhere (Simoni 2015, 2016b, 2018, 2019a, 2019b), returnees may for instance cast themselves, and be looked upon by residents, as an exemplary source of inspiration in terms of 'good' economic functioning and planning when setting up new business ventures. Returnees could brag about having learned much, *allá* ('over there'), in terms of how to save, put money aside, and capitalize; how to make a proper business plan and provide adequate service to customers, 'capitalist style'; how to act responsibly as professionals and separate business from social relationships. All this may be in line with the kind of valorization, in development narratives, of the right 'work ethics' and 'western' values (Glick Schiller and Faist 2010:9). Blue's (2013) recent work on the impact of economic and social remittances of returned Cuban '*internationalistas*' is helpful in moving us beyond the reductive undertones of the typical view of Cuban returnees bringing back values like individualism, materialism, and capitalist modes of entrepreneurship. Blue's '*internationalistas*' – mainly medical professionals returning from temporary government-contracted missions in other developing countries – for instance, also 'developed a new appreciation of the positive aspects of Cuban society, including the lack of violence, equal access to free health care and education and the solidarity that exists in Cuban society' (2013:55), and went on to transmit their '[n]ew ideas,

perspectives and cultural influence' to 'immediate friends, family and co-workers, and beyond' (2013:54) – their influence further accrued by public exposure of their views via reports and documentaries on Cuban television.

Among his returnee interlocutors, Simoni also found much evidence of Cubans bringing back values that departed from the more predictable emphasis on alleged 'good' – i.e. capitalist – economic skills and competences and other '*nouveau riche*' sensibilities (Blue 2013:47). This is not to say that the latter were not significant. Rather, it is a warning not to oversimplify articulations of morality, their complexity, heterogeneity, and multiple sources and directionalities. Themselves reflective of such complexity, some interlocutors questioned the assumption that coming with economic experience from abroad necessarily meant one would be better prepared and more successful in setting up a business in Cuba. On the other hand, there were also returnees voicing disapproving moral assessments of life in 'capitalist' Europe, and who found renewed value in alleged Cuban modes of getting through the day: 'Today I have money, I will use it and share it, tomorrow we will see... but someone else may chip in!' argued George, a returnee in his forties back for five years in Cuba, having spent twenty in France. Others praised and enacted (stereo-)typical Cuban modes of sociability, contrasting them to the anonymity and lack of solidarity they attributed to 'developed' countries: 'This is life, life itself, you see, people, talking to each other, friendship, sharing a bottle together on a public square!', commended Yuri, also in his forties, recently back on the island after ten years in Japan. The same could happen in relation to gender roles, with Cuban male returnees embracing with renewed vigor alleged Cuban 'macho'-like modes of relating with women (see Simoni 2019a), and distancing themselves from the more egalitarian gender ethos ascribed to their host countries back in Europe, only to get back to it at other moments, when praising the moral lessons they had learned 'out there'<sup>xv</sup>.

Still other Cuban returnees, like Pedro, a man in his sixties who had been living in Croatia for the past five years, could refer to his commitment to an 'alternative' lifestyle that brought together values of simplicity, environmental sensibility, self-sufficiency, savvy business guile, and a disregard for politics – the whole encompassed by a self-professed Rastafari-inspired mode of being whose cosmopolitan features were hardly traceable either 'here' (Cuba) or 'there' (Croatia). We could multiply examples here. To be clear, in line with the heuristic gist of this article, our goal is not so much to determine definite trends or patterns. Rather, it is to draw attention to the complex and heterogeneous traffic of moral assertions, positionings, and judgments leading to diverse 'moral assemblages' (Zigon 2010). This stresses the limitations of any analytical endeavor that seeks to establish stable and univocal origins and directionalities, as metaphorical takes on the notion of remittance may lead to suggest. The main point is that any model of social or moral remittances that simplistically equates one migratory experience with the absorption and transfer of one clear set of societal values and cultural sensibilities, risks grossly oversimplifying the moral fabric not only of a given culture and society, but also of any single person.

## Conclusion

Among migration scholars, we already find excellent analyses of how migrants may simultaneously occupy 'two or even three different regimes of value' (Pine 2014:S101), of how they may face dilemmas 'caused by competing ethical frameworks' (Meloni 2020:429). We argue that it is precisely the causes, dynamics, and consequences of

these sorts of ambivalences and multiplicities that an anthropological focus on morality and ethics helps us better recognize and account for in our analysis, so as to achieve understandings that are closer to the complexity of the lived realities migration affects. This, we believe, is also a productive step towards breaking out of the 'national' and the 'migration' container, as Dahinden (2016) urges migration scholars to do, and to move beyond the still widespread epistemological model that equates one society, or a subgroup in a society, or even a category of person for that matter, with one prevailing set of norms, values, and moral dispositions. As we explained in the opening section, one of the key insights of the recent attention to morality and ethics in anthropology is the recognition that people are situated at the crossroads of a range of (often competing) moral directions and demands. This is an insight that helps us overcome the tenacious tendency, at least since Durkheim, of seeing the moral and the social as coterminous. All social contexts, and all persons engaging in them, are shaped and influenced by moral assemblages that combine a range of institutional, public, and personal moral discourses (Zigon 2010). Influences can be intimate, local, regional, transnational, global, and hold different authority and power, as several of the examples addressed in this article made clear.

In a case of convergence, for instance, of moral assumptions by international institutions in the migration field, moral precepts by hegemonic economic actors (e.g. WB, IMF), policies and incentives by national governments, sermons by religious leaders, messages broadcasted by media outlets, familial expectations and obligations – and the list of moral actors and influencers may go on – we may expect that migrants' embodied moral dispositions become informed and will tend to align with the hegemonic 'mantras' of the time. But as the Cuban material and the work of other migration scholars discussed above suggest, institutional and public discourses, located at different scales and coming from different directions and sources of authority, are seldom converging, and can often carry competing and contradictory messages. What is more, migrants are not passive targets of moral instructions and influences. Rather, they are always at the crossroads of and responding to a range of moral narratives and demands, including those of their most intimate relatives. They thus undergo moral breakdowns that lead them to exert ethical reasoning, conscious reflection, and questioning. It is such ethical moments of explicit engagement with morality that we encourage scholars of migration to probe further in their analyses. To do so, we must also take the time, and have the courage, to reflexively acknowledge and question our own moral assumptions and possible alignments with the normative and the hegemonic moral discourses that permeate our field of research and that risk 'black boxing' and naturalizing some of its core assumptions. For in such reflective ethical moments, both of scholars and of their research participants, lies the promise of changing one's moral dispositions and, more broadly, the public and institutional discourses on morality that are informing and reciprocally informed by them (Zigon 2010).

The study of moral remittances, or of the moral in remittances, as proposed in this article, enables us to focus analytical attention on such shifts, providing an empirically grounded and theoretically sophisticated entry point to unpack and assess the workings and effects of migration. Among the key areas of problematization and change nourished by remittances, we identified two interrelated ones, namely notions and enactments of family and family obligations on the one hand, and economic practice and the uses of money, including their entanglements with development notions and projects, on the other. Albeit very significant in the case of Cuba and

across the range of literature we considered, our goal is not to argue that these are the only areas of moral difficulty remittances bring into play. Other such areas may be revealed by further research. The broader theoretical aim, in this sense, was to illustrate the analytical potential of the approach outlined here, rather than to delimit a priori the areas of investigation it may serve to address. If moralities drive and inform remittances, as we have shown, moral breakdowns and ethical moments recalibrate their meanings, leading people to explicitly (re)negotiate and (re)define the relations that tie remitters and recipients and their respective contexts of life. The effects of this are multi-scalar and potentially far-reaching. These may include (re)formulating allegiances, reciprocities, and obligations with regard to families, communities, as well as broader entities and places such as countries and nation-states. This is also when views of responsibility, solidarity, care, duty, deservingness, entitlement, trust, rationality, freedom, choice, constraint, crisis, development, political economic systems, and North-South relations and dependencies may be explicitly brought into play, problematized, and reworked.

The proposed approach helps identify, contextualize, and analyze such processes of reworking and retooling. When, why, and how are these notions, entities, and relations affected and transformed by the sending and receiving of remittances, and vice-versa? In answering these questions, scholars' attention to morality, and more particularly the analysis of moral breakdowns and ethical moments, holds much promise and appears instrumental. Our hope is to inspire future research to deploy these analytical tools to uncover the extent and nature of the problematizations that remittances bring about in a variety of contexts of migration, and to do so in ways that are attuned to, and able to account for, the moral reasonings that inform such processes. The plurality of moral narratives and demands, their overlaps, simultaneities, and uneven influences, is a growing feature of life in the contemporary world, all the more so in the transnational contexts of mobility fostered by migration, prone as these are to engender tensions between competing desires, aspirations, values, and obligations (Pine 2014; Meloni 2020; Scalettaris et al. 2019). What the anthropology of ethics and morality can help us spotlight and uncover are the paths through which such demands and narratives circulate, the institutions, public discourses, and more intimate communities of enunciation (e.g. friends and relatives) that convey them, their relative power and influence, and the way researchers and the subjects of their investigations come to be confronted and accept, incorporate, resist, oppose, and redefine them. For in such interplay of uneven influences, and in the ethical transformations they accompany and help engender, is the potential for something new to emerge, and to bring about social, cultural, and personal changes that it is our task, as social scientists, to uncover, explain, and intervene upon.

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<sup>i</sup> The anthropological literature on ethics and morality has been gaining traction in the last couple of decades, notably following Laidlaw's (2002) contribution. While the list is not exhaustive, we can mention here the recent monographs and edited volumes of Robbins (2004), Zigon (2008), Sykes (2009), Lambek (2010), Faubion (2011), Fassin (2012), Laidlaw (2014), Mattingly (2014), Keane (2015), and Lambek et al. (2015). Acknowledging the existence of different empirical foci, theoretical approaches and conceptual propositions (see Mattingly and Throop 2018 for a useful review), we draw mainly on the theoretical insights of Zigon (2007, 2008, 2009, 2010).

<sup>ii</sup> What must be retained in Mahmood's reflection on habitus, which distinguishes it significantly from the more socio-economically determined version outlined by Bourdieu (1977), is that 'it emphasizes the conscious and intentional work necessary to acquire a particular kind of habitus' (Zigon 2010:8 drawing on Mahmood 2005:137-139). Both Mahmood and Zigon are influenced by a Foucauldian approach to ethics, and the recognition that people undertake conscious work on themselves 'to become socially recognized moral persons' (Zigon 2008:45, see Foucault 1997).

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<sup>iii</sup> By contrast, for Zigon ‘the study of the unreflective moral dispositions of everydayness is essentially what anthropologists have traditionally considered when studying embodied culture, tradition and power... studies [that] cannot be properly called an anthropology of moralities’ (2007:140).

<sup>iv</sup> The findings presented here are therefore the result of a total of 24 months of ethnographic research based mainly on participant observation and on hundreds of informal conversations with a broad range of Cuban residents (mainly in Havana) and migrants (mainly in Barcelona). In spite of their diversity, research interlocutors are not representative of the Cuban resident nor migrant population, and there is a notable bias towards middle-aged Cuban men from relatively disadvantage sectors of the population (see Simoni 2016a and 2016b for more details on field access and methods).

<sup>v</sup> Cuba is considered a relative ‘latecomer to the group of remittance-receiving countries’ (Hansing and Hoffmann 2019), notably due to the vicissitudes of the relationship with its diaspora, particularly in the US – a relationships that has for a long time been curtailed by political tensions. The flow of remittances to Cuba has been growing steadily in the last decades, so much so that between 2008 and 2014 this Caribbean island recorded the highest rise in remittances for the whole of Latin America, going from 1’447 billion USD to 3’129 billion USD (Morales 2016), and further rising to over 3’575 billion USD in 2017 (Morales 2018). The dramatic economic crisis that followed the collapse of the Soviet Union in 1989, Cuba’s key ally and partner, contributed to the Cuban authorities shifting attitude towards its diaspora, and the valuing of remittances as a welcome injection of hard currency into a struggling economy (Eckstein 2010b:1050). Together with new US policies that further lifted restrictions on sending remittances to Cuba (ibid.), the country has now moved from a phase of relative exceptionalism to a new phase of ‘convergence with remittance patterns seen in other developing countries’ (Blue 2013:45).

<sup>vi</sup> Anthropologists have uncovered the relations between morality and emotions, feelings and sentiments, showing the moral significance and appropriateness of particular emotions according to contexts (cf. Throop 2012; Cassaniti 2014). Throop (2012) also argues that ‘moral breakdowns’ are intertwined with, and sometimes produced by, emotions.

<sup>vii</sup> We use pseudonyms and alter certain details of research participants’ profiles to protect confidentiality.

<sup>viii</sup> Such calls for unconditional allegiance to one’s mother came up repeatedly in the course of Simoni’s field research, both in Cuba and among Cuban migrants in Spain, and find support in wider considerations on the enduring importance of matrifocal notions of kinship and family duty in Cuba (see in particular Safa 2005 and Härkönen 2015).

<sup>ix</sup> As argued by Parsons (2017) and Parsons et al. (2014), these examples show that migration is best grasped as a multi-situated and multi-scalar phenomenon (notably the scales of sending and receiving places, and of migratory flows), which is shaped by multiple dimensions that add to the economic ones – and Parsons (2017) mentions for instance norms, symbolic meanings, power relations, social networks.

<sup>x</sup> Examples could be multiplied here. See for instance Herrera (2017) on Ecuadorian migrant women in Spain and the United States and how remittances – via what we would refer as ethical work – come to be recognized as forms of care, or Pribilsky (2012) on Ecuadorian illegal migrant men in New York and the reconfiguration of their role as ‘good’ father and husband.

<sup>xi</sup> Recent studies of Cuban migration reflect on significant changes both in migratory legislation and Cubans’ mobility patterns, and how these intersect with further openings of the Cuban government to private enterprise and business endeavors (see Martín and Barcenas 2015; Aja et al. 2017; Krull and Stubbs 2018; Bastian 2018). This has generated some optimism among Cuban migrants in terms of circulating back and forth from Cuba, eventually returning more permanently, and setting up viable businesses in the country (see Simoni 2016b and Aja et al. 2017).

<sup>xii</sup> Such insights are premised on, and lend support to recognizing the social, cultural, and moral dimensions of economic life. This is something that, particularly since Polanyi’s (1971) work, continues to inform anthropological approaches to the economy (see Hann and Hart 2009 and Narotzky and Besnier 2014). Entanglements between economy and morality are explicitly addressed in the edited volumes of Parry and Bloch (1988), Humphrey and Mandel (2002), Browne and Milgram (2009), and Sykes (2009).

<sup>xiii</sup> This is a risk that Thompson (1991) already identified in his reassessment of the notion of the moral economy. Having reviewed several uses of the concept following his original contribution, this author called for renewed attention to how ‘the two parts of the term’ (Thompson 1991:345) – the ‘economy’

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and the 'moral' – were constituted and conceived in a given research context (ibid.). Rather than following Fassin's (2009) extension of Thompson's (1971) original conceptualization to consider an 'economy of morals', for instance, we thus encourage scholars to adopt a narrower and more precise use along the lines suggested by Palomera and Vetta (2016) and in Simoni's (2016b) analysis of 'economization' and 'moralization' processes.

<sup>xiv</sup> Without using the notion of 'remittances', Gmelch (1980) already emphasised the impact of the returnees in their homeland in terms of input of skills, capital, ideas, structural changes and encouragement to migrate (1980:146).

<sup>xv</sup> See Smith (2006) for a very interesting parallel in the case of Mexican New York residents on return visits to Mexico.