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REPORT

Cuba on the threshold of change: Structural collapse, Transatlantic pressure and Transition Scenarios

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EXECUTIVE SUMMARY

In June 2026, Cuba is traversing the most remarkable convergence in its contemporary history: a humanitarian crisis of unprecedented proportions in the post-Soviet period, the most intense external pressure campaign ever exerted on the regime by Washington, and the launch of a formal review process of the Political Dialogue and Cooperation Agreement (PDCA) between the European Union and Havana. These three variables, which for decades operated in isolation, are now feeding into one another at a pace that drastically shortens the available analytical timeframes.

The central thesis of this report is as follows: Cuba stands before a historic window of transformation that will not, however, automatically become a democratic transition.

This report analyzes four possible scenarios for political change in Cuba. These scenarios are not mutually exclusive and may interact or overlap as events unfold. Scenario A, the most likely in the short term, involves a negotiated transition led by regime elites and unfolds in two variants: (A.1) an elite pact that preserves the core structures of power while offering limited reforms and economic opening, and (A.2) an induced erosion process in which sustained external pressure and growing internal fractures gradually push the regime toward reforms that ultimately undermine its own authoritarian foundations. The report also explores (B) institutional collapse triggered by social and economic breakdown, (C) growing international isolation through transatlantic coordination, and (D) direct external intervention or maximum coercive pressure.

The probability of a negotiated collapse between the Cuban security apparatus and Washington, along the lines of what occurred with Venezuela in January 2026, is today greater than at any point in the last thirty years. But that probability does not imply democracy: it implies an elite realignment in which Cuban civil society, if not incorporated as a determining actor, could be excluded from the terms of the transition.

Given this context, it is essential that the international community, especially the European Union, preserve clear incentives and conditionalities oriented toward democratization. The release of political prisoners, the effective incorporation of civil society, and the establishment of verifiable mechanisms of political opening must constitute minimum requirements for any agreement aspiring to produce a legitimate and stable transition.

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I. THE ANATOMY OF A COLLAPSE: BEYOND THE HUMANITARIAN DIAGNOSIS

1.1 The exhaustion of a model

The Cuban economy faces a projected 15% GDP contraction in 2026, threatening a regression to levels unseen since the "Special Period" of the 1990s.¹ This systemic collapse, characterized by an 89% poverty rate, a near-total failure of basic infrastructure, and unprecedented levels of state repression, is not a temporary crisis. Rather, what Cuba is experiencing in 2026 is the point of arrival of a model, that is, the natural end of a totalitarian system with an economic model based on the extraction of wealth by a family and military elite, created out of loyalty to a family autocracy. The Cuban economy never functionally recovered from the disappearance of the USSR, because the regime never abandoned the absolute centralization that required an external patron to be viable.

For two decades, Venezuelan oil served as the substitute lifecycle for the regime. However, the confluence of Venezuela's domestic crisis and the tightening of external energy policies has exposed the reality of the Cuban economy:

- **Productive Paralysis:** Daily power outages extending up to 34 hours have effectively halted industrial and domestic activity.
- **Public Health and Sanitation Failure:** The medical system has receded into a critical emergency-only mode, marked by acute shortages where treatable conditions prove fatal. Sanitation and potable water infrastructure have collapsed, forcing reliance on rudimentary resources like charcoal for cooking.
- **Institutional Regress:** Basic state functions, including public education and municipal waste management, have ceased normal operations.

1.2. Escalating Repression as a Terminal Symptom

¹ Pedro Monreal González. 'Cuba: Estimations on GDP Contraction in 2026.'. Available at: <https://pedromonreal.substack.com/p/cuba-se-mantiene-el-repunte-de-la>

Rather than signaling regime security, the current wave of state violence reflects a profound loss of domestic legitimacy and a shrinking margin for political maneuver. Cuba counts, as of this date, more than one thousand political prisoners, the highest historical record since systematic records have existed. Among them, 35 minors and 142 women. In April 2026 alone, 23 new individuals were detained for political motivations. The Cuban Human Rights Observatory documented 390 repressive actions in January 2026.

The customary interpretation of these figures as evidence of the regime's strength is, in fact, the inverse of the correct analysis. Totalizing regimes that repress spontaneous demonstrators with this intensity—people protesting against blackouts with no political organization behind them—do not do so out of security, but out of fear. Mass repression in contexts of economic collapse is a symptom of lost legitimacy, not of its preservation. The threshold of tolerance has disappeared precisely because the margin for maneuver has also disappeared.

Historically, the regime utilized the selective release of political prisoners as diplomatic currency to secure leverage in external negotiations. The unprecedented growth in the prison population points to two critical structural hypotheses:

1. **Negotiation Impasse:** The regime anticipates no near-term diplomatic engagement or sanctions relief from external actors.
2. **Loss of Internal Cohesion:** The internal apparatus lacks the stability required to manage orderly concessions without risking a total loss of control.

From an analytical standpoint, both scenarios significantly diminish the probability of a managed or orderly political transition.

II. THE EXTERNAL SIEGE: WASHINGTON, BRUSSELS, AND THE UN PARADOX

2.1 The Trump-Rubio strategy: the 'Venezuelan model'

The Trump administration has, during the first five months of 2026, articulated the most intense pressure campaign exerted by Washington against Cuba in decades. Its three axes are: the energy blockade that has reduced oil supplies to zero for more than three consecutive months; individual sanctions targeting the GAESA conglomerate and members of the Castrist elite and the Castro family itself; and the criminal prosecution of the regime's historic inner circle.²

On May 20, the Department of Justice filed formal charges against Raúl Castro, with four counts of murder and two related to the destruction of aircraft, in reference to the 1996 shootdown of the Brothers to the Rescue planes.³ This is the first time in history that US justice has charged a former Cuban head of state. The symbolic weight of this action exceeds its probability of execution: Raúl Castro, age 94, remains in Cuba and is unlikely to be extradited. But the message it sends to the entire command structure of the regime is unequivocal: no rank confers permanent impunity.

GAESA, the military-business conglomerate that controls between 30% and 90% of the Cuban economy according to different estimates, with near-absolute dominance over retail trade, is the true strategic target of Rubio's sanctions.⁴ Targeting GAESA is not attacking the regime in the abstract: it is dismantling its financial circulatory system. The logic is the same as that applied against Venezuela: creating conditions of economic unsustainability to force a negotiation with the military elite.

² U.S. Department of Justice. 'Grand Jury Indicts Former Cuban President Raúl Castro.' Official press release, May 20, 2026. Available at: <https://www.justice.gov/opa/pr/united-states-unseals-superseding-indictment-charging-raul-castro-and-five-castro-regime-co>.

³ NPR. 'U.S. grand jury indicts Raúl Castro, former Cuban president.' May 20, 2026. Available at: <https://www.npr.org/2026/05/20/g-s1-122383/us-cuba-raul-castro-indictment>.

⁴ Global Security. 'Cuba FAR Economy.' Accessed May 2026. Available at: <https://www.globalsecurity.org/military/world/cuba/far-economy.htm>.

On May 14, 2026, CIA Director John Ratcliffe visited Havana in one of the highest-level conversations between Washington and the Cuban regime in decades.⁵ Ratcliffe met with Raúl Guillermo Rodríguez Castro, grandson of Raúl Castro and central figure in the succession of power, with Interior Minister Lázaro Álvarez Casas, and with the head of Cuban intelligence services Ramón Romero Curbelo.

President Díaz-Canel publicly acknowledged the contacts in a televised address, noting that negotiations were in their 'first phase'.⁶ Deputy Minister Carlos Fernández de Cossío, however, 'categorically' rejected the notion that Díaz-Canel's removal was on the table.

2.2 The European Union: from engagement to inflection point

On May 19, 2026, EU High Representative Kaja Kallas confirmed before the full plenary of the European Parliament in Strasbourg that the PDCA with Cuba is under formal review.⁷ The declaration was not a surprise to those who had closely followed the civil society advocacy process before European institutions. The Cuban civil society organization Ciudadanía y Libertad had communicated this information days earlier, following the week of meetings in Brussels from May 12 to 16 with European Parliament Vice-President Esteban González Pons and senior officials of the European External Action Service.

In January 2026, the European Parliament had approved Amendment 82 with 331 votes in favor, calling for the review and suspension of privileged cooperation with Cuba, linking the decision to the documented presence of more than 1,076 Cuban combatants in Russia's war against Ukraine and to the use of European funds in repressive structures.⁸

The PDCA includes a human rights clause, Article 85(3)(b), which allows its suspension in

⁵ Axios. 'CIA director visits Cuba for rare meeting as island runs out of fuel.' May 14, 2026. Available at: <https://www.axios.com/2026/05/14/cia-ratcliffe-cuba-talks-raulito>.

⁶ ABC News/AP. 'Cuba, US confirm high-level negotiations after Trump predicts regime's fall.' May 2026. Available at: <https://abcnews.go.com/Politics/cuba-us-confirm-high-level-negotiations-after-trump-predicts/story?id=131049007>.

⁷ Kaja Kallas. Statement before the Plenary of the European Parliament, Strasbourg, May 19, 2026. Available at: https://www.europarl.europa.eu/doceo/document/CRE-10-2026-05-19-INT-2017076850225_EN.html

⁸ ECR Group. 'ECR Group calls on the EEAS to suspend the EU–Cuba Political Dialogue and Cooperation Agreement.' January 22, 2026. Available at: https://ecrgroup.eu/article/ecr_group_calls_on_the_EEAS.

cases of serious violations.⁹ With 1,260 political prisoners, documented systematic repression, and the regime's active participation in an armed conflict on European soil in support of the aggressor, the thresholds for activating that clause have been widely surpassed. The question is no longer whether the review is justified. The question is whether European institutions will have the political will to carry it through to its logical consequences, or whether the review will become merely a mechanism for managing political pressure without real consequences for Havana.

2.3 The UN paradox: instrumentalized humanitarianism

The escalation of international attention toward the Cuban humanitarian crisis has opened a paradox that the regime has managed to instrumentalize effectively. The UN appeal requests 94 million dollars for urgent assistance, acknowledging the autonomous and structural dimension of the energy crisis.¹⁰ Foreign Minister Bruno Rodríguez met with Secretary-General António Guterres on May 26 to frame the collapse as a direct consequence of the US energy blockade.

This narrative is politically effective and analytically dishonest. It deliberately omits that Cuba's energy crisis is structural and predates Trump's blockade; that the Cuban economy never developed an autonomous productive base because the political model prevented it; and that humanitarian resources, channeled without political conditionalities, have historically been absorbed by the Cuban State to sustain itself, not to transform. Any humanitarian response decoupled from verifiable demands for political reform is, at best, a transfer of resources to a regime that will use them to prolong its existence.

⁹ Political Dialogue and Cooperation Agreement between the European Union and the Republic of Cuba, Article 85(3)(b). Official Journal of the European Union, 2016. Available at: <https://eur-lex.europa.eu/EN/legal-content/summary/political-dialogue-and-cooperation-agreement-with-cuba.html>.

¹⁰ United Nations Office for the Coordination of Humanitarian Affairs (OCHA). *Plan of Action of the United Nations System in Cuba: Response to the Energy Crisis and Hurricane Melissa Emergencies*. United Nations, March 2026. Available at: <https://www.unocha.org/publications/report/cuba/plan-action-united-nations-system-cuba-response-energy-and-hurricane-melissa-emergencies-march-2026>

III. THE ANATOMY OF POWER: GAESA, THE ARMED FORCES, AND THE CASTRO SUCCESSION

3.1 The State within the State: the military economy as a system of impunity

To understand the transition scenarios in Cuba, it is essential to start from a premise that is rarely articulated with sufficient clarity in conventional political analysis: the Cuban State and the Revolutionary Armed Forces are not separate institutions. They are, functionally, the same entity. GAESA, the Business Administration Group of the FAR, controls between 70% and 90%, depending on the methodology used, of the most profitable sectors of the economy: tourism, retail trade, financial services, real estate, imports and exports, and transportation.

This fusion between military power and economic power has direct consequences for the viability of any transition. In the democratization processes of Eastern Europe after 1989, armed forces were actors relatively separable from the economic apparatus of the State; their 'neutralization' through impunity agreements or integration into new structures was possible precisely because their material interests could be dissociated from the survival of the political system. In Cuba, that dissociation does not exist.¹¹ The military elite cannot survive economically without control of the State, which exponentially raises the perceived cost of any real reform.

Analysts at the Cuban Research Institute and other specialized centers have documented that sectors of the Cuban elite have begun to reposition themselves economically in anticipation of structural changes, expanding their participation in the sector of Micro, Small, and Medium-Sized Enterprises (MSMEs) linked to power. This behavior, consistent with patterns observed in Eastern European and some Latin American transitions, suggests that there are sectors of the nomenclatura that calculate the possibility of change and seek to secure a place for themselves in the post-regime scenario. It is a signal of fracture, not of collapse; but fractures are, historically, the starting point of transitions.

3.2 The succession problem and the 'Raulito' variable, el Cangrejo

¹¹ Armando Chaguaceda. 'Cuba's Three Autocratic Transitions: From Revolutionary Regime to (Post)Totalitarianism and New Authoritarianism?' *Bulletin of Latin American Research*. Wiley Online Library, February 2026. Available at: <https://onlinelibrary.wiley.com/doi/10.1111/blar.70070>.

Ratcliffe's meeting with Raúl Guillermo Rodríguez Castro, known as 'Raulito', el Cangrejo, grandson of Raúl Castro and son of Déborah Castro Espín and the late General Luis Alberto Rodríguez López-Calleja, who for years led GAESA, is the most revealing datum in the entire diplomatic process underway.¹² His selection as interlocutor is not coincidental: 'Raulito' represents the intersection between the dynastic inheritance of Castroism and the military-economic control of the State.

Marco Rubio is negotiating directly with 'Raulito', according to CIA sources.¹³ This information carries strategic relevance that surpasses any public statement by Díaz-Canel. It indicates that Washington has identified the family-military succession as the true center of power, not the nominal president. It also indicates that the model being constructed is not a democratic transition but an elite realignment: the substitution of internationally discredited figures by managers of the same apparatus with greater diplomatic capital.

The death in July 2022 of General Luis Alberto Rodríguez López-Calleja, who was considered the most powerful man in Cuba after Raúl Castro and the likely manager of any economic transition, left a void in the power architecture that has not been completely resolved. His death, described as a 'political earthquake for the regime' by Cuban diaspora analysts, opened an internal competition for control of GAESA that 'Raulito' appears to have won, at least provisionally. This competition is also a structural fracture.

¹² NPR. 'CIA Director John Ratcliffe met with Raul Castro's grandson in Havana.' May 15, 2026. Available at: <https://www.npr.org/2026/05/15/nx-s1-5823340/cia-director-john-ratcliffe-met-with-raul-castros-grandson-in-havana-us-and-cuban-officials-say>.

¹³ Axios. 'CIA director visits Cuba for rare meeting as island runs out of fuel.' May 14, 2026. Available at: <https://www.axios.com/2026/05/14/cia-ratcliffe-cuba-talks-raulito>.

IV. SCENARIOS FOR A TRANSITION: PROSPECTIVE ANALYSIS

The four scenarios developed below are not mutually exclusive in all their extremes. The determining variable in all of them is the position of the Armed Forces in the face of the accelerated deterioration of internal conditions. The factor that ranks them hierarchically is their estimated probability in the medium term (12 to 36 months) and their potential to produce a democratic outcome.

Scenario A.1: Elite pact, the Venezuelan solution applied to Cuba

This is the scenario of greatest probability in the short term. The regime, facing the exhaustion of its energy and financial reserves, accepts a negotiated agreement with Washington that contemplates the replacement of Díaz-Canel by a more transactional figure from within the apparatus itself, possibly someone from the military-economic orbit of GAESA, with Oscar Pérez-Oliva Fraga at the top of the list, in exchange for the lifting of the energy blockade and the suspension of the most aggressive sanctions.¹⁴

This is the scenario that Washington appears to be actively constructing. The Venezuelan precedent, where Maduro was captured in January 2026 but the Chavista apparatus survived in a remodeled version, is the explicit reference point of several analysts. Its structural weakness is precisely its tactical strength: it allows every actor in power to proclaim a 'transition' without any of them having ceded real control. For Cuban civil society and the more than one thousand political prisoners, this is the most dangerous scenario, disguised as hope.

The Lowy Institute has noted that the logic of the Trump administration is to force the Cuban Communist Party to accept a market-oriented transition in exchange for the political survival of the nomenclatura.¹⁵ But this logic has a foundational flaw: it assumes that Cuban elites are

¹⁴ ABC News/AP. 'Cuba, US confirm high-level negotiations after Trump predicts regime's fall.' May 2026. Available at: <https://abcnews.go.com/Politics/cuba-us-confirm-high-level-negotiations-after-trump-predicts/story?id=131049007>.

¹⁵ Lowy Institute. 'Is Cuba Next?' The Interpreter. March 31, 2026. Available at: <https://www.lowyinstitute.org/the-interpreter/cuba-next>.

sufficiently pragmatic and sufficiently unified to negotiate with a single voice. The available evidence suggests that neither condition is guaranteed.

Scenario A.2: Induced Erosion

A complementary and non-exclusive variant of the elite pact scenario contemplates a process in which factions within the regime itself drive gradual reforms, not out of any democratic conviction, but out of a survival imperative in the face of sustained external pressure. The logic is paradoxical: each concession extracted from outside opens a fracture that weakens the internal cohesion of the totalitarian apparatus, and each fracture demands a further concession to keep the negotiation viable. What begins as a calculus of control ends by turning the regime into the unwilling agent of its own dismantlement. The central tension of this scenario lies precisely in whether that process reaches the point of no return, the threshold beyond which the reformist momentum can no longer be reabsorbed by the system, and that will depend, in large measure, on the sustainability of external pressure and on the capacity of civil society to occupy the space that erosion progressively opens.

Scenario B: Collapse through accumulation and unplanned institutional breakdown

The combination of terminal energy crisis, widespread hunger, and spontaneous protests produces an unplanned institutional breakdown that the regime cannot contain. The contraction of 15% of GDP estimated for 2026 has no precedent in the post-Soviet period and generates cumulative social pressure that the available repressive tools cannot absorb indefinitely.¹⁶

This scenario is possible in the medium term, but its outcome is not necessarily democratic. An institutional breakdown without organized civilian leadership, without an agreed transition framework, and without a civil society with operational capacity inside the country can devolve into chaos, massive migration of destabilizing dimensions for the entire region, or — most likely — the capture of the transition process by sectors of the security apparatus itself

¹⁶ Pedro Monreal González. 'Cuba: Estimations on GDP Contraction in 2026.' El Toque, May 2026. Available at: <https://pedromonreal.substack.com/p/cuba-se-mantiene-el-repunte-de-la>.

acting as 'saviors of order'.¹⁷ Chaguaceda's analysis is pertinent here: the absence of democratic political culture among officials and citizens, and the dissident mentality that finds its only channel in protest or exile, brings Cuba closer to pre-democratic African transitions than to European or Latin American models of democratization.

Scenario C: Transatlantic alignment and regime isolation

The opening of the review of the Political Dialogue and Cooperation Agreement (PDCA), combined with Washington's sustained pressure, produces a convergent transatlantic position that isolates the regime in its last sources of international legitimacy. If the suspension of the PDCA is pursued through the activation of the conditionality clauses, the regime's access to European cooperation mechanisms would be closed off; it would lose diplomatic legitimacy and capacity to act within the European sphere. Furthermore, an alignment could allow the European Union to impose sanctions on entities and individuals who are members of the Castrist inner circle.¹⁸

This is the scenario that most directly depends on the sustained work of Cuban civil society before European institutions, and the one that can be built with the greatest strategic coherence from an advocacy standpoint. It is also the scenario most likely to contribute to an orderly transition, because it keeps Europe as an actor with real influence over the process and does not reduce it to a bilateral negotiation between Washington and Havana in which democratic interests are subordinated to the geopolitical interests of both parties.

Its weakness is European institutional slowness and the persistence of member states with economic interests in maintaining access to the Cuban market. The gap between values rhetoric and political decision-making remains the Achilles' heel of EU foreign policy regarding authoritarianism.

Scenario D: Direct external intervention

The possibility of US military action has ceased to be a purely speculative scenario, but its most precise formulation is not that of a classic intervention but rather one of maximum

¹⁷ Robert Lansing Institute. 'Political Stability in Cuba: Risks of Power Change and Potential Consequences.' March 17, 2026. Available at: <https://lansinginstitute.org/2026/03/17/political-stability-in-cuba-risks-of-power-change-and-potential-consequences/>.

¹⁸ CiberCuba. 'The European Union will review its agreement with Cuba after years of civil society pressure.' May 20, 2026. Available at: <https://en.cibercuba.com/noticias/2026-05-20-u1-e135253-s27061-nid329806-union-europea-revisara-acuerdo-cuba-tras-anos>.

coercive pressure aimed at catalyzing change from within. Trump has used the expression *friendly takeover*; the deployment of the aircraft carrier USS Abraham Lincoln to the Caribbean was deliberately communicated as a deterrence signal; and the precedent of Maduro's arrest in January 2026 has demonstrated that actions that seemed unthinkable can be executed rapidly when structural conditions make them possible. The risk calculus of authoritarian elites in the region has changed irreversibly, and that change is, in itself, a democratic asset.

What makes this scenario relevant is not the probability of a direct intervention but the effect of disciplining that its mere possibility exerts over the regime's internal actors. When a military elite calculates that the cost of resistance includes the possibility of external coercive action, its willingness to negotiate increases. In that sense, the presence of the Lincoln in the Caribbean was not a diplomatic failure; it was a lever that opened the table of Ratcliffe in Havana.

A democratic outcome depends on one critical condition: Cuban civil society must be able to fill the political space that emerges during a transition. This condition cannot be taken for granted. But neither is it absent. Over the past decade, Cuban activists have built networks of resistance under difficult conditions. Repression has also produced experienced leaders with organizational and political skills. At the same time, the Cuban exile community has developed its own institutions, resources, and support networks. Together, these assets represent significant political capital. With sustained support from international partners, they can provide the organizational foundation needed to manage and sustain a democratic transition.

The question is not whether that capital exists; it is whether the international democratic community is willing to invest in it with the same seriousness with which Washington invests in coercive pressure.

V. CUBAN CIVIL SOCIETY AS A STRATEGIC VARIABLE, NOT AS A DEPENDENT VARIABLE

The most frequent analytical error in the study of potential Cuban transitions is treating civil society as a dependent variable of the process: as the passive beneficiary of a transition designed by external actors. This reading is not only politically inconvenient; it is analytically incorrect.

The successful democratic transitions of the twentieth century and the present century share a structural characteristic: they required the existence of organized civil actors capable of occupying the political space at the moment of rupture, of negotiating the terms of the transition from a position of representative legitimacy, and of building democratic institutions during the constituent period. Where those actors did not exist or were excluded, the result was the capture of the State by the same elites of the previous regime in new configurations.

In the Cuban case, organized civil society exists in exile and, under severe restrictions, inside the island. There are many civil society organizations, political groups, and networks of young artists and academics who have worked for a democratic vision of Cuba through critical thought and civic action. These actors, though little known, are not peripheral to the transition process: they are its condition of possibility.

VI. NECESSARY CONDITIONS FOR A DEMOCRATIC TRANSITION

On the basis of the analysis developed in the preceding sections, this report identifies five necessary, though not sufficient, conditions for any process of change in Cuba to lead to a genuinely democratic transition:

First: The release of all political prisoners must be a non-negotiable condition in any negotiation process. Not as a gesture of goodwill, but as verifiable evidence of the beginning of a dismantling of the repressive apparatus. Any agreement that does not include this demand

is an agreement with the regime about the conditions of its survival, not about the conditions of Cuban freedom.

Second: Cuban civil society, both from exile and from within, must be formally incorporated as an actor in any negotiation process. The exclusion of civil society from the terms of the transition reproduces the authoritarian pattern under new labels. Europe, in particular, has the responsibility to guarantee this inclusion as a condition of its participation in the process.

Third: The progressive dismantling of GAESA as a monopolistic economic actor is a structural condition of any real transition. As long as the military apparatus controls between 70% and 90% of the Cuban economy, there will be no real separation between political power and economic power, and the conditions for a competitive democracy cannot develop.

Fourth: The international community, and in particular the European Union, must reject any agreement that reproduces the Venezuelan model: the substitution of individual figures without structural transformation of the political system. The PDCA must be suspended or renegotiated with verifiable conditionalities, not used as an instrument for managing political pressure.

Fifth: A transitional justice framework must exist. The experience of post-authoritarian transitions teaches that unresolved impunity agreements, not addressed before the democratic process begins, become institutional fractures that weaken democratic consolidation for decades. Cuba needs a serious debate, led by Cuban civil society, about the terms of accountability.

VII. CONCLUSION: THE WINDOW AND ITS CONDITIONS

Cuba confronts the most critical window of transformation in its contemporary history. This shift is driven not by a regime decision to democratize—of which there is no evidence—but by a volatile convergence of internal economic collapse, unprecedented external pressure, and a progressive fracturing of the elite. Together, these forces have drastically eroded the viability of the status quo.

Yet, a window of transformation guarantees neither democracy nor stability. It represents a fragile opening that may shutter prematurely or plunge the nation into an abyss. Historically,

elite-negotiated transitions that exclude civil society have merely reconstituted authoritarian systems under new leadership. Applying a "Venezuela Solution" to Cuba risks precisely this outcome: a tactical realignment of the military-economic nomenclature that preserves the architecture of control while merely replacing its most internationally discredited faces.

Avoiding that outcome requires that the international democratic community, and in particular the European Union, with its specific diplomatic capital in Havana, keep the bar high: no agreement without freed political prisoners, without incorporated civil society, without verifiable conditionalities for democratic transition.

Democratic culture is not inherited; it is built. In Cuba, its foundation represents decades of resilience to which successive generations of dissident leaders have contributed—a legacy no diplomatic compromise can substitute. Ultimately, the trajectory of the Cuban transition will be defined by what Cuban civil society is empowered to make of it.

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Carolina Barrero is founding director of Ciudadanía y Libertad (Citizens and Freedom), an organization dedicated to promoting civil and political rights in Cuba. An activist and writer, she works from exile in Spain after being forced to leave Cuba in February 2022. Carolina Barrero participated in the protest movement during 2021 associated with the 27N group and the San Isidro Movement in different protests in Havana that contributed as a spark for the civil uprising of July 2021 as one of its leaders. In 2024, she was recognized as a Sakharov Fellow by the European Parliament. Her work focuses on research and analysis of human rights issues, collaborating with international organizations to raise visibility of the situation in Cuba and its geopolitical implications. Her approach combines political and cultural thought, philosophy, and the history of ideas, analyzing the global authoritarian dynamics.

