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CUBA BETWEEN LATIN AMERICA AND THE CARIBBEAN: A SUI GENERIS MODEL OF INTERNATIONAL INSERTION¹

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1. Introduction

Since the 1959 revolution, Cuba's high levels of human development have seen it ranked in an intermediate position among the countries of the Global North and South, on the one hand, and LAC, on the other. The 2020 Human Development Index placed Cuba 70th in the world and 6th in the region. It is listed among the countries with a "high level of development", ahead of Mexico, Peru, Colombia and Brazil,² and during the Cold War its development was similar to that of the socialist countries of the "second world". Within the Americas it has also served as a bridge between Latin America and the Caribbean island states. In spite of multiple setbacks and very limited resources, Cuba has managed its two positions in a way that has given it disproportionately large geopolitical influence for its small size and population, despite or precisely because of its dispute with the US.

The two conditions – North–South bridge country and dual Caribbean–Latin American identity – have been an advantage when it has come to regional integration. During the Cold War, being the only country in the Americas with a socialist regime and membership of the Council for Mutual Economic Assistance (CMEA or Comecon)³ stymied its full integration into the region. But when the bipolar confrontation vanished in the 1990s this ceased to be a problem, in fact it became an advantage, as it meant Cuba participated in and had presence, influence and recognition both inside and outside the region.

Cuba's closest neighbours in the region are The Bahamas, Haiti and Jamaica. Its special status between Latin America and the Caribbean allows it to play in both leagues: on the one hand, the island participates in the Association of Caribbean States (ACS) and CARIFORUM and, on the other, it is a founding member of the Ibero-American Summits and the Community of Latin American and Caribbean States (CELAC).

Cuba's full acceptance in LAC and its active participation in a number of interregional cooperation forums and mechanisms has also facilitated rapprochement between Cuba and the EU, particularly since the creation

1. We are grateful for the comments and suggestions made by Elisa Botella Rodríguez, member of the Europe–Cuba Forum, which helped to improve the article.
2. <http://hdr.undp.org/en/countries/profiles/CUB>; <http://hdr.undp.org/en/2020-report>
3. CMEA was created in 1949 from a socialist bloc of 11 countries to serve as an organisation for economic cooperation with the USSR at its centre. The organisation was dissolved in 1991.

of CELAC. Its presence in the Latin American and Caribbean and Ibero-American “communities” have been an advantage for Cuba when negotiating an agreement with the EU. In this context, it is worth recalling that the negotiations between Havana and Brussels had taken several different forms: in the 1990s (1994) they were conducted on a bilateral basis; after 2000 attempts were made to situate the relationship within CARIFORUM and the ACP group of countries; and from 2014 onwards a return was made to bilateral dialogue until the Political Dialogue and Cooperation Agreement (PDCA) was signed in 2016.⁴

From this starting point, first the text investigates what development model Cuba represents out of a great range of international integration strategies in the region (Shifter, Binetti, 2019), giving consideration to the political and economic priorities. Secondly, it analyses the advantages, obstacles and limitations to Cuba’s full regional and international integration in the various different forums in which it has been active through the different stages from the Cold War to the present day. By addressing these two questions, the chapter analyses the possible alternatives to the regional integration model practiced by the government. Following this introduction, the questions will be addressed in four sections: a brief theoretical and empirical reflection on Cuba’s international integration model; an examination of the evolution of its gradual integration process in the Americas; an analysis of its active role in South–South cooperation from the 1959 revolution to the present; and a final evaluation that takes stock of the current insertion model and includes some prospects for the future in an uncertain context.

2. The Cuban model of international insertion: political and economic pillars

While debates have taken place on “international insertion” as a structurally dependent position for Latin America and the Global South (Chagas-Bastos, 2018), the concept has engendered little further academic development and barely any relevant academic literature exists. As an idea “international insertion” or the “international insertion model” combines Political Economy and Foreign Policy Analysis and generally refers to the search for spaces of agency in international politics (Chagas-Bastos, 2018: 10), particularly by the countries of the Global South. From a critical point of view, it also means a position of subordination and/or acceptance of the global rules defined by a small group of powerful countries (Chagas-Bastos, 2018: 15). When it comes to Latin America two strands have dominated: first, the structural asymmetries between core and periphery put forward in Dependency Theory; and second the international context that frames the region’s development problems, as gathered, from a trade and investment perspective, by ECLAC (Chagas-Bastos, 2018: 12).

Shifter and Binetti (2019: 77) provide a more pragmatic definition, arguing that an international insertion model means having a roadmap that indicates which countries and international institutions should be prioritised, which are the key markets and on which issues on the global agenda the focus should be placed. According to this definition, unlike its capitalist neighbours, Cuba has not prioritised insertion in regional

4. [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22016A1213\(01\)&qid=1647879493483&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22016A1213(01)&qid=1647879493483&from=EN)

or international markets. Its insertion model has been shaped by the importance given to preserving its political system, with strategic alliances favoured with ideologically similar partners – first the USSR and then Venezuela. This prioritisation of the political is a crucial difference from the other countries in the region considered in this chapter, with Cuba's socialist political system making it an outsider in regional terms. A second feature that distinguishes it from the rest of the region is the long-term vision and the search for political autonomy, which somewhat conflicts with the economic dependence when it comes to basic necessities such as food and medicine, as we will show below.

According to article 16 of its 2019 Constitution, "The Republic of Cuba bases international relations on the exercise of its sovereignty as well as on ... antiimperialist and internationalist principles" (Constitución de la República de Cuba, 2019: 8). This foreign policy principle confirms its status as a "rebel state" (Schenoni & Escudé, 2016), above all due to the longstanding conflict with the United States that gave rise to an insertion model that is autonomous and distanced from Washington, but dependent on other partners – first the USSR and later Venezuela. It should also be recalled that the US continues to impose sanctions on the government in Havana, a sign of the high economic and political costs of a foreign policy of "absolute autonomy", as defined in Carlos Escudé's theory of Peripheral Realism (Schenoni & Escudé, 2016: 7). Its position of rebel against US hegemony forced Cuba to seek an insertion model of regional and international alliances with other "enemies" of Washington – first the Soviet Union and from 2000 onwards Venezuela – or with those who "challenged" the sanctions, including Canada, the EU and some of LAC. However, in a vicious circle, the strategic relations with these partners created new dependencies that replaced the previous ones: colonial dependency on Spain until 1898 was replaced by dependence on the United States until 1959 when, following the revolution, Cuba's development became dependent on trade with the USSR and since 2000 with Venezuela.

As well as a declarative statement of the anti-imperialist nature of its foreign policy, Article 16 d) of Cuba's constitution states that it "Reaffirms its will to integrate and collaborate with the countries of Latin America and the Caribbean". This process has led to the full normalisation of its relations with the region, albeit with fluctuations as the political leanings of the other Latin American leaders have changed, with much more favourable conditions between 2003 and 2013 during the mandates of the so-called Pink Tide presidencies of Lula da Silva in Brazil, Evo Morales in Bolivia and Hugo Chávez and later Nicolás Maduro in Venezuela, who forged close ties with the Havana government (Kruijt, 2019: 292).

Cuba's insertion in the region was achieved thanks to the pull of the soft power produced by the resilience or strength of its David versus Goliath image, the appeal of its special insertion model and its socialist political system. Cuba looked to strengthen its ties with LAC in order to gain allies in its dispute with the United States and because it needed to explore new markets after the dissolution of the socialist bloc. Losing the USSR as a strategic ally sunk the country into its deepest economic crisis since the revolution, with GDP falling more than 30%. Overnight, it was forced to seek new partners among capitalist countries, especially in its immediate surroundings.

Cuba has not prioritised insertion in regional or international markets. Its insertion model has been shaped by the importance given to preserving its political system.

Cuba weathered the storm thanks to cooperation with a few neighbouring countries like Canada, and with the EU. Although it was obliged to carry out some capitalist economic reforms (Alonso, Vidal, 2020; Gratius, 2021), it did not follow model that dominated in the region in the 1990s of neoliberal economic policy based on the “Washington Consensus”. Its period of greatest regional insertion coincided with the region changing model, as leftist presidents won elections in Argentina, Bolivia, Brazil, Ecuador and other countries between 2003 and 2013 and advocated a more autonomous and socially focussed form of regional integration based on South-South cooperation and fighting poverty and inequality. Within this bloc of countries with leftist governments that opted for a more autonomous type of insertion with their differing strategies and policies, Cuba represented the most radical wing, along with Venezuela. They joined forces in 2004 to create the Bolivarian Alliance for the Peoples of our America (ALBA), an ideological initiative for South–South cooperation that included Bolivia, Nicaragua, Ecuador (for a time) and several Caribbean countries, which benefited from cooperation with Cuba (technical assistance) and Venezuela (energy cooperation through Petrocaribe).

The commodity price boom of 2003–2013 also brought an acceleration of China’s penetration in the region. Ahead of its neighbours, Cuba was the first country to establish closer economic and political ties with Beijing and China became an important trading partner early in the post–Cold War period. It never reached the preponderance of the USSR in its day, but Havana in some ways served an important gateway for China into Latin America. One consequence of countries like Argentina, Brazil, Bolivia, Costa Rica, Chile and Peru growing closer to China was that their relations with the United States cooled, which in turn facilitated Cuba’s regional insertion and helped overcome the isolation from its neighbours experienced during the Cold War (see Table 1).

Table 1: Cuba’s trade partners (% of total), 2020

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|---|--------------------------|-------------------|
| Imports | Exports | Total trade |
| EU: 36.6% | EU: 36% | 1. EU: 36.5% |
| China: 13% | Venezuela 20.2% | 2. China: 11% |
| Argentina: 7.4% | Russia: 9.3% | 3. Russia: 6.1% |
| Mexico: 6.2% | Switzerland: 3.9% | 4. Argentina: 6% |
| Russia: 5.4% | Bolivia: 3.3% | 5. Venezuela 5.9% |
| Brazil: 4.7% | Taiwan: 3.1% | 6. Mexico: 5.2% |
| USA: 4.4% | Hong Kong: 2.7% | 7. USA: 4% |
| Canada: 3.9% | USA: 2.4% | 8. Brazil: 3.9% |
| Vietnam: 3.8% | Turkey: 2.2% | 9. Canada: 3.4% |
| Venezuela 2.7% | Dominican Republic: 1.9% | 10. Vietnam: 3.2% |

Source: European Commission, *European Union, Trade in Goods with Cuba*. Directorate-General for Trade, 2 June 2021.

In contrast to previous periods, data for 2020 (European Commission, 2021; ONEI, 2021) suggest that trade grew with partners that are not strategic political allies. Until 1989, Cuba’s economic insertion was enacted through relations with the USSR and CMEA (Pérez, 1983). From 2000 to 2014 the dominant relationship was with Venezuela, initially under Hugo

Chávez's leadership. But in recent years, the EU has been Cuba's largest trading partner, accounting for 36.5% of exports and imports. China sits in second place with less than a third of the EU's proportion (11%), followed by Russia (6.1%), Argentina (6%), Venezuela (5.9%), Mexico (5.2%) and the United States (4%). In terms of Cuban exports, Venezuela remained in second place in 2020,⁵ behind the EU.

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The same trend is reflected in the strategic sector of tourism. According to data from the ONEI, Cuba's National Statistics Office, in 2020 (year of the COVID-19 pandemic) 1.2 million tourists visited the island from, in declining order, Canada, Russia, the United States, France, Germany, Italy and Spain. These figures also reflect the dissonance between an international insertion model that seeks ideological allies and the pragmatism of an economic insertion model that increasingly depends on actors that do not meet these criteria, particularly Canada and the EU and its member states.

Unlike the Cold War period, when almost 90% of the island's trade was with the USSR and its allies, and the first decade of the millennium, when Venezuela accounted for 40% of Cuban trade, the rest of Latin America currently plays a larger role in commercial relations. Thus, alongside Venezuela in the list of the main destinations for Cuban goods exports, is Bolivia in fifth place and the Dominican Republic in tenth. While among countries from which Cuba imports most Argentina ranks third, Mexico fourth and Brazil sixth (European Commission, 2021). First of all, this confirms the presence of a more pragmatic and reformist economic policy, while it also attests to the growing importance of LAC in providing a model of regional insertion into which Cuba is gradually incorporating itself.

In recent decades, the Cuban economy has been characterised by extreme dependence on foreign aid and a financing crisis that continually recurs despite successive debt cancellation and reduction agreements being reached in recent decades. These deficiencies are determined by both internal and external factors. The United States' embargo, which prevents Cuba from normalising relations with its neighbour and natural partner, is undoubtedly one of the key determining factors in the development of relations with the region. US–Cuba trade has taken place since 2000, when the embargo was partially lifted on the importing of medicine and food, with the Cuban government obliged to pay in cash. However, other limitations impede the full development of relations between Cuba and its neighbours, which are explained below.

3. From regional isolation to insertion

Despite the progress made, Cuba faces two barriers to its full insertion in the region. First, its exclusion from the Organization of American States (OAS), from which it was initially forced out, but more recently has been in self-imposed exile, prevents it from holding regular dialogue with 34 countries, from participating in continental initiatives and from accessing soft loans from the Inter-American Development Bank (IDB) and other continental financial instruments. The root cause here is the US embargo. Second, its socialist development model prevents it from participating in regional integration processes that involve trade liberalisation.

5. https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_cuba_en.pdf

3.1. Cuba and the OAS

Cuba's regional insertion and its complex relationship with the OAS (see Geoffray, 2021) and the inter-American system in general were made even more difficult, particularly during the Cold War, by the awkward fit of its socialist model in a US-dominated continent. Setting out to prevent a "second Cuba" in its hemisphere through diplomatic and even military means, the US excluded the island from continental initiatives like the Alliance for Progress, which was specifically designed to avoid communist governments taking hold. The effects of political isolation were augmented by the economic sanctions Cuba faced via the embargo and the extraterritorial sanctions that were even strengthened in the post-Cold War period, as, with the aim of toppling the Castro regime (Hoffmann, 1997), the Torricelli Act and Helms-Burton Act were approved in 1992 and 1996, respectively.

Cuba was a founding member of the OAS and participated in the organisation and in the wider inter-American system until 1962, when Resolution VI of the 8th Meeting of Ministers of Foreign Affairs held in Punta del Este (Uruguay) ruled that the Marxist-Leninist regime posed a threat to collective security, and a majority of countries, led by the US, decided to exclude Cuba not only from the OAS but from the inter-American system as a whole (Peña Barrios, 2021: 24). A second sanction prohibiting bilateral diplomatic relations with Cuba imposed by the OAS in 1964 was not lifted until 1975.

In the first phase of the Cold War, Mexico and Canada were the only two countries in the Americas that maintained diplomatic relations with Cuba, and they remain the island's most enduring partners, despite both signing the North American Free Trade Agreement (NAFTA) with the US in 1994. Both use their ties with Cuba to challenge Washington's sanctions policy and show "solidarity" with the threatened Revolution (Erisman & Kirk, 2018) while demonstrating that their foreign policy is autonomous, despite their major economic dependence on the US. The historically good relationship with Mexico helped open the door to greater cooperation with Canada, a country that has always condemned Washington's embargo and was for many years a strategic partner for Cuba through what was called "constructive engagement" (investment, dialogue, tourism, development cooperation and trade), cementing a relationship of friendship (Legler and Baranyi, 2009) that has survived various changes of government.

When the OAS clause prohibiting relations with Cuba disappeared in 1975, the island's gradual political reintegration with all the countries in the region began. At first, the process towards full diplomatic normalisation was slow, but it accelerated, especially after the Cold War ended, when LAC ceased to be a secondary battleground in the ideological and military confrontation between the US and the USSR (Cuba's main ally until its dissolution in 1991). After the Soviet bloc collapsed, Cuba carried out its own constitutional reform in 1992 and began to consider the best way to approach its relations with the OAS.

Cuba's exclusion from the OAS in 1962 might have been due to its status as a Marxist-Leninist country, but this was not the only obstacle to its reincorporation. The democratic transitions that took place in

the region during the 1980s meant that the barrier to Cuba's return to hemispheric institutions shifted from being the socialist nature of the regime to the absence of plural elections (López-Levy, 2009). This was accentuated when the Inter-American Democratic Charter was approved in 2001,⁶ which explicitly states that one of the purposes of the OAS is to promote and consolidate representative democracy and that the member states have "the obligation to promote and defend it". But the Democratic Charter is not binding and it should be recalled that the Cuban government has had no hesitation in signing similar documents like, for example, the declaration of the VI CELAC Summit whose point 21 "reaffirms its commitment to guarantee full respect for democracy and citizen participation, the rule of law, as well as unrestricted respect for human rights".

Beginning with the 1998 election victory of Hugo Chávez, who established a close alliance with Fidel Castro, it was the rise of left-wing leaders to power in many Latin American countries from the late 1990s onwards that changed the perception of relations with Cuba and facilitated its partial incorporation first into Latin American regionalism and then also into hemispheric relations. The change of government in Brazil that followed Lula da Silva's victory in 2002 was decisive in facilitating Cuba's insertion in the region. It was the Brazilian president who promoted Cuba's inclusion in the Summits of the Americas and the lifting of the special clause that prevented its full membership of the OAS. In 2004, Cuba co-founded ALBA with Venezuela and four years later it joined the Rio Group, CELAC's predecessor.

Latin American pressure and the Democrat Barack Obama winning the US presidency in 2009 saw the clause that had excluded Cuba from the OAS annulled by the unanimous vote of all members.⁷ However, the Cuban government rejected its reinstatement, arguing that the organisation is an instrument of US domination. Instead, along with other governments from the so-called 21st century left, the Cuban government favoured making CELAC an alternative space for regional cooperation to the OAS, with the United States excluded.

Nevertheless, Cuba attended the 7th Summit of the Americas held in Panama in 2015, which was where Raúl Castro and Barack Obama met for the first time since the thaw in relations was announced on December 17th 2014. However, the rapprochement with the hemispheric forum was cut short when Donald Trump was elected president of the United States and reversed his predecessor's policy by opting for a return to confrontation. Neither he nor Raúl Castro attended the next Summit of the Americas, the 8th, which was held in Lima in 2018. During Trump's term and with Luís Almagro as Secretary General the OAS became an increasingly polarised forum (Geoffray, 2021), with the Venezuelan political crisis the focus of regional tensions. As Cuba's closest ally, it incurred harsher sanctions and pressure, and the prospects of further rapprochement between Cuba and the United States diminished.

In 2022, the United States is scheduled to hold the 9th Summit of the Americas, the first of the Joe Biden presidency. As host, it will fall to him to demonstrate whether greater priority will be given to hemispheric relations, as he has suggested. The Cuban regime's democratic deficit

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6. https://www.oas.org/charter/docs/resolution1_en_p4.htm
7. AG/RES. 2438 (XXXIX-O / 09)

The island retains its power of attraction due to the Revolution's status as a symbol of resistance and soft-balancing or defiance of US hegemonic power.

continues to be an obstacle. Reincorporation would mean Cuba subjecting itself to the scrutiny of the Inter-American Commission on Human Rights, something the Cuban government has always opposed – though that hasn't stopped the organisation from preparing regular reports on the human rights situation on the island. The last such report was published in June 2020 and analysed the 2017 to 2019 period (IACHR, 2020). The attempt by the chair of the Permanent Council of the OAS to convene an extraordinary session on the human rights situation in Cuba after the July 2021 protests was opposed by several member countries allied to the Díaz-Canel government, who considered it an unfriendly move towards a non-member country.⁸ The priority Biden has placed on defending democratic principles in his hemispheric foreign policy limits the chance of advancing on Cuba's insertion in pan-American organisations, with the sole exception of the Pan American Health Organization (PAHO).

3.2. Cuba's reinsertion in the region

Cuba's regional status is somewhat paradoxical: on the one hand it is not fully integrated into the region and, on the other, it has been the symbol and promoter of an autonomous Latin American regionalism that challenges the United States and its interpretation of democratic conditionality. While almost all Latin American and Caribbean countries accepted and agreed to this democracy clause, they did not demand that Cuba accept it before joining regional organisations and forums, and nor was there any debate on the issue. In this sense, the island retains its power of attraction due to the Revolution's status as a symbol of resistance and soft-balancing or defiance of US hegemonic power.

Today, Cuba maintains diplomatic relations with the continent's 34 countries. Its political reintegration into the continent has been a gradual process that began in the 1970s in the Caribbean and has lasted several decades. In 1972, Barbados, Guyana, Jamaica and Trinidad & Tobago decided to re-establish diplomatic contacts with Castroism and counteract the regional trend towards isolating Cuba. It was the beginning of a closer relationship with several non-Spanish-speaking neighbours and the transfer of Cuban human resources to certain Caribbean countries. However, the Dominican Republic and Haiti did not re-establish full relations with Cuba until 1998, with Costa Rica and El Salvador following in 2009 when Cuba joined the Summits of the Americas. Although Cuba maintained close ties with its Caribbean neighbours, its support for various attempts to establish socialist governments, such as the 1979 revolution on the island of Grenada that was thwarted by US military intervention in 1983, led to tensions with the region.

In the late 1980s, the disintegration of the socialist bloc forced Cuba to rebuild its relations with Western countries, especially in Latin America and the Caribbean. After a long period of regional isolation and distance, in the post-Cold War setting new spaces for autonomy opened up, allowing full diplomatic insertion and partial integration into certain organisations and economic spaces. Thus, Cuba participated as a founding member in the Association of Caribbean States (ACS), which was created in 1994 in Cartagena de Indias to promote

8. <https://www.efe.com/efe/usa/portada/la-objeccion-de-algunos-paises-obliga-a-oea-aplazar-una-sesion-sobre-cuba/50000064-4597006>

“consultation, cooperation and concerted action” among its 32 member and associated states. Because of its socialist or statist economy, Cuba does not form part of the Caribbean Community (CARICOM), although bilateral summits have been held since 2002.

These political ties also facilitated some Caribbean countries joining the ALBA initiative, where they benefitted from South–South cooperation with Cuba and oil from Venezuela. As well as opening up new economic opportunities in its neighbourhood, in political terms cooperation with the Caribbean provides Cuba with essential diplomatic support in regional (CELAC) and international (United Nations) forums when it comes to condemning US sanctions and solidarity with Cuba’s anti-hegemonic struggle. Cuba is also a member of organisations with an economic focus like the Latin American and Caribbean Economic System (SELA) and the Latin American Integration Association (ALADI), which it joined in 1996 and 1998, respectively (see Table 2).

| Organisation | Members | Objectives | Status of Cuba | Obstacles |
|--------------------|---------------------------------------|--|---|---------------------------------|
| OAS (1948) | 34 (Caribbean, LA, North America) | Democracy, development, security | Did not request re-admission | Democracy clause |
| ALADI (1980) | 19 LA countries | Technical harmonisation in trade | Full member since 1998 | Socialist economy |
| ECLAC (1984) | 33 LAC countries | Statistics and reports on the socio-economic situation | Full original member | Access to some economic data |
| SELA (1975) | 19 LA countries | Consultation forum, in decline | Founding member | None |
| CELAC (2011) | 33 (Caribbean, LA) | Political dialogue, summits | Full original member | Democracy clause |
| ALBA (2004) | 11 LAC countries | South–South cooperation | Full original member | Financial resources |
| ACS (1994) | Caribbean countries, Venezuela | Cooperation between Caribbean countries | Founding member | None |
| Petrocaribe (2005) | Caribbean, Central America, Venezuela | Oil supply | Full integration | Financial resources (Venezuela) |
| CARICOM (1957) | 14 countries | Economic and political integration | Not a member | Socialist economy |
| CARIFORUM (1970) | 15 countries | Caribbean Group of the ACP-EU Group | Full member, but not of the Cotonou Agreement | ACDP Cuba and EU |

Source: compiled by authors, updated from Gratius (2018).

Cuba was a founding member of CELAC upon its creation in February 2011 and even hosted the 2nd summit, which took place in Havana on January 28th and 29th 2014 and whose most important outcome was to declare the region a zone of peace. Despite the democracy clause CELAC inherited from its predecessor, the Rio Group, there was no regional debate on Cuba’s incorporation, among other reasons due to the predominance of left-wing governments in the region that promoted the island’s insertion into the intra-Latin American system and which, in passing, sent a message of autonomy to Washington and the OAS.

Backed by Brazil and with Mexico’s longstanding support, Cuba’s incorporation met no intra-regional opposition. This was an important

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step for Cuba's relations with the EU because regionalism was followed by inter-regionalism and the EU–CELAC Summits automatically counted on Cuban participation without prior debate, as had been the case with previous summits at which the island was present, following the first edition in 1999 in Rio de Janeiro. As well as bringing regional recognition, participating in CELAC enabled Cuba to take part in the two EU–CELAC Summits (2013 and 2015) and the CELAC–China Forum which, unlike the EU–CELAC Summits, which have been halted since 2015, continue to be held every year. Hence, Cuba was fully integrated into the region without being part of the inter-American system. The island is also one of the original members of the Ibero-American Summits set up in 1991 under Spanish leadership. These have played a part in promoting South–South and triangular cooperation in the region and had significant Cuban participation.

At present, the Cuban regime is fully recognised and participates in eight out of ten regional initiatives and organisations. This number includes ALBA, the group the island spearheads with Venezuela, whose appeal grew in the region during the 2004–2014 period and which acted as a counterweight to the Free Trade Area of the Americas (FTAA) promoted by the United States, which sought to create a hemispheric free trade zone and failed, among other reasons, due to resistance and pressure from the ALBA group, along with Argentina and Brazil (see Table 1). Cuba's participation in all these forums consolidated a successful regional recognition policy that bore fruit over 30 years after the 1959 revolution.

Today Cuba is fully accepted in the majority of LAC organisations and forums and, despite ideological differences, none of its neighbours questions its participation in ALADI, the ACS or CELAC for political reasons or invoking the democracy clause. That is why Latin American and Caribbean countries' reactions to the protests in Cuba in July 2021 and their violent repression were lukewarm, except in countries with centre-right governments like Brazil and Colombia. However, US coercion and the ongoing conflict continue to hinder Cuba's full political and economic insertion in the American continent, including access to soft loans from the IADB.

3.4. Relations with the Caribbean: cooperation without integration

While Cuba established diplomatic relations with a number of Caribbean countries in the 1970s, it was not part of the integration processes that took place in its neighbourhood. The island participated in neither the 1975 creation of CARIFTA (the Caribbean Free Trade Association) nor the 1973 founding of CARICOM (the Caribbean Community) –both free market-based economic integration processes that are incompatible with its centralised socialist economic system.

However, Cuba has played an active role in regional dialogue as a founding member of the Association of Caribbean States (ACS) and through its close bilateral relations with Caribbean countries via cooperation agreements. The Convention Establishing the ACS was signed on July 24th 1994 in Cartagena de Indias, Colombia, with the purpose of promoting “consultation, cooperation and concerted action”

among all the Caribbean countries. It is formed of 25 member states⁹ and seven associate members.¹⁰ It is a consultative body that involves no transfer of sovereign powers and among whose objectives is to develop the potential of the Caribbean Sea through interaction between member states and with third countries and to promote an expanded economic space for trade and investment that provides opportunities for cooperation and dialogue.

Within this framework, Cuba was able to develop its relations not only with the Caribbean islands, but also with the Central American countries with Caribbean coastlines (Martínez Reinoso, 2015). The secretaries-general of CARICOM, the ACS and the Central American Integration System (SICA) meet periodically, but the ambition of achieving cooperation is hamstrung by the shortage of financial resources and the greater strength of other regional initiatives that emerged later. And yet some interesting projects have been set up, such as the Caribbean Sea Commission, which was founded in 2006 to promote and supervise the sustainable use of the Caribbean Sea, the Agreement for Regional Cooperation on Natural Disasters and the progress towards implementing a Caribbean Territorial Information Platform for Disaster Prevention.

The path towards rapprochement between Cuba and CARICOM was promoted from the 11th summit held in Kingston (Jamaica) in 1990, where it was agreed that a commission should be sent to Havana to analyse bilateral collaboration projects, particularly in the fields of biotechnology, human resources development, trade, tourism and the environment. In 1993, the Cuba–CARICOM mixed commission was created and in 1996 Cuba requested that an agreement be negotiated that was eventually finalised in 2000 when the CARICOM–Cuba Trade and Economic Cooperation Agreement was signed. The Second Protocol to the CARICOM–Cuba Trade and Economic Cooperation Agreement was signed in 2017 and since 2002, Cuba-CARICOM Summits have been held every three years. In 2002, Cuba drew up a comprehensive plan for the Caribbean (*Plan Integral del Caribe*) that was implemented from 2003 onwards and which sought to bring cohesion to all Cuban actions towards the region and establishes the basic aims of Cuban foreign policy.

Laguardia (2015) gives several reasons why Cuba's accession to CARICOM is, however, unviable: the unique nature of its economic and political model, the transfer of sovereignty that participation in regional integration schemes requires and the exhaustive overhaul the Cuban economy would have to undergo as a prerequisite for admission (Laguardia, 2015). Trade between Cuba and CARICOM therefore remains relatively insignificant compared to trade with other countries. It is hindered by factors such as high transport costs, legal and institutional differences, insufficient financing and credit mechanisms and, manifestly, the United States' continuing blockade against Cuba (Laguardia, 2015). The declaration from the last CARICOM–Cuba Summit on December 8th 2020, which was held remotely and shaped by the impacts of COVID-19, underlines the "will to strengthen South-South cooperation as an expression of solidarity, for the promotion of bilateral and regional programs, as well as triangular cooperation for development",¹¹ especially in the areas of health and natural disasters.

9. Antigua and Barbuda, Bahamas, Barbados, Belize, Colombia, Costa Rica, Cuba, Dominica, the Dominican Republic, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, St. Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago and Venezuela.
10. Aruba, Curaçao, France (French Guiana & Saint Barthélemy), Guadeloupe, the Turks and Caicos Islands (inactive), the British Virgin Islands, Martinique, the Kingdom of the Netherlands, Saint Martin and Sint Maarten.
11. <https://caricom.org/final-declaration-of-the-7th-caricom-cuba-summit-meeting>

Without full membership of CARICOM Cuba was unable to sign up to the Cotonou Agreement, despite attempts to include it.

Without full membership of CARICOM Cuba was unable to sign up to the Cotonou Agreement, despite attempts to include it on several occasions. This means that EU policy towards Cuba treats it as part of Latin America. As such, cooperation funds are allocated in the percentage that corresponds to the region within the Neighbourhood, Development and International Cooperation Instrument (NDICI). Meanwhile, it was not given access to the European Development Fund (EDF) for the Africa, Caribbean and Pacific (ACP) group, as ultimately Cuba was not included in that grouping (Dembicz and Rudowski, 2021). Nevertheless, the Caribbean's inclusion in the NDICI and the integration of EDF resources into the EU's general budget will facilitate EU regional cooperation with the Caribbean, including Cuba. What is more, since 2001, Cuba has been a full member of CARIFORUM, a group for dialogue and cooperation between Caribbean countries and the EU, although it has not joined the EU-CARIFORUM Economic Association Agreement, as it is a free trade agreement.

Petrocaribe was created in 2005, six months after ALBA was officially established in Havana in 2004. These initiatives boosted South-South cooperation in the Caribbean through the perfect combination of Venezuelan financial capital and Cuban human and technical capital (Martinez Reinoso, 2015). The implementation of initiatives such as *Operación Milagro* (to improve the eyesight of people with few resources) and the literacy project *Yo Sí Puedo* helped foster positive feelings towards Cuba among Caribbean countries and people. This helped ensure continued support in international forums such as the OAS and CELAC, where, due to their numbers, these countries provide strong backing. ALBA and Petrocaribe's cooperation has been weakened by Venezuela's political and financial crisis, although many Caribbean countries continue to give political backing in international forums. Petrocaribe has also contributed to funding some cooperation projects within the ACS.

By including several member countries from the Caribbean and having specific projects for the subregion, ALBA and Petrocaribe, led jointly by Cuba and Venezuela, have become the two main platforms for South-South cooperation. Alongside its petrostate ally Venezuela, Cuba took on prominent role in the Caribbean. This, and the fact that it is the largest island in the Antilles, explains Cuba's preference for a bilateral agreement with the EU and for being included in the programme with Latin America and not the EDF. As the latter was originally created to facilitate cooperation with the less-developed former European colonies, Cuba was never really a good fit.

4. Insertion via south-south cooperation: cuba between two worlds

Cuba's international status was exceptional until the Cold War ended, being located somewhere between the "second and third worlds" and isolated in its own neighbourhood for decades by the US policy of embargo and harassment (Alzugaray, 2015). To connect the two spheres of its foreign policy, Cuba engaged with the Soviet bloc and with developing countries outside of LAC. Following the revolution, Cuba took on international commitments, participating in the Non-

Aligned Movement (NAM), which was created in 1961, the G-77 three years later and the Buenos Aires Plan of Action I (1978) and Buenos Aires Plan of Action + 40 (2019), within the framework of the United Nations conferences and initiatives in this field (Ruiz Cumplido, 2015). With the backing of multilateral organisations, Cuban internationalism worked both in its own region – especially with Central American and Caribbean countries – and beyond its neighbourhood, above all in Sub-Saharan Africa, in a continuation of the support for the revolutionary or similar governments to which Cuba provided aid, military advice and medical assistance from the 1960s to the 1980s.

4.1. The first stage of South–South cooperation between the “second and third worlds”

Cuba has traditionally been highly active in South–South cooperation. It did not participate in the Bandung Conference in 1955 (before the revolution), which produced the NAM, but it was the only country from its region to take part as a member at the second conference in Belgrade in 1961, where the group was officially founded and at which most countries were Asian and African. From that point on, it took on a leadership role that led to it organising the 6th Summit Conference in Havana in 1979, in which 96 member states, nine observers and ten guests participated (Albuquerque, 2017).

Cuba has also been a promoter of the Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation among Developing Countries (BAPA) approved in 1978.¹² This laid the foundations for what is now known as South–South cooperation, whose regained momentum over the last decade was in evidence at the second High-level United Nations Conference on South–South Cooperation (BAPA + 40)¹³ held in 2019 in Buenos Aires. It was also a founding member of the Sao Paulo Forum created in 1990, which later became part of the World Social Forum.

On the other hand, Cuba was part of the socialist bloc and in 1972 joined the Council for Mutual Economic Assistance (CMEA) led by the Soviet Union. Until the USSR was dissolved and Russia gradually withdrew from 1990 onwards, the socialist countries of Central and Eastern Europe, Vietnam and other member states of the socialist bloc were Cuba’s main economic and political partners (Pérez, 1983). Within the CMEA framework, the island also formed close relations with countries such as the pre-unification German Democratic Republic (GDR), Poland, Hungary and the Czech Republic, which, after joining the EU in 2004 became, under post-socialist governments, harsh critics of the human rights violations of Cuba’s one-party regime in a reversal of their own recent history within the socialist bloc.

Whereas economic relations with that group of countries were very close and various exchange schemes were set up with the former German Democratic Republic (GDR), among other places, these bonds all but disappeared in the last days of the Cold War and when the first democratic governments renewed their countries’ political relations with still-socialist Cuba they were difficult and at times conflictive. Among other occasions, this was evident during the annual meetings of the

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12. <https://drive.google.com/file/d/0B-buqyoV0jpSMm1OVEZYU2hNTWc/view?resourcekey=0-vHSWEOfh9t7DRHmRvShVZQ>

13. <https://documents-dds-ny.un.org/doc/UNDOC/GEN/N19/066/47/PDF/N1906647.pdf?OpenElement>

South–South cooperation was a way to export the Cuban Revolution and win allies (against the United States) outside the Americas.

Council of the EU on the Common Position on Cuba approved in 1996, with Poland and the Czech Republic promoting diplomatic sanctions against the Cuban government and a hard political line.

During the Cold War, Cuban activism beyond CMEA and its immediate environment focused mainly on Africa (Angola, Mozambique), where there was more room for manoeuvre than in LAC, which was dominated by the US as hegemonic power. Cuba supported the struggles for independence in Algeria (1954–62), Mozambique (1964–74), Angola (1961–75), Guinea-Bissau (1963–4) and Cape Verde (1962–75), among other places, with military cooperation accompanied by social assistance (medical services and literacy campaigns). At the time, South–South cooperation was a way to export the Cuban Revolution and win allies (against the United States) outside the Americas and, among other reasons, to each year condemn the unilateral sanctions Washington imposed on the island.

4.2. The second stage of South–South cooperation with Latin America

Aiming to export the Revolution around the region, Cuba gave support to the armed struggles in Bolivia and Colombia and later Nicaragua during the Sandinista Revolution of 1979. This generated tensions with several countries in the region and within the OAS and, among other things, hindered its political and economic reintegration into the neighbourhood. Once the Cold War ended, relations became more cooperative. Cuba offered medical services to ideologically sympathetic countries and in 1999, under Fidel Castro's presidency, set up the Latin American School of Medicine (ELAM), which to this day trains doctors and other health personnel from many Latin American and African countries (Kirk and Erisman, 2009). ELAM is part of the Comprehensive Health Program (PIS), which promotes Cuban health internationalism in Latin America, the Caribbean, Africa and Asia. Its purpose is twofold: to export Cuban health services abroad in order to increase soft power while at the same time counteracting the capitalist model embodied by the United States – in Guerra Rondón's words, creating a counter-hegemonic tool (2020: 4).

In this second phase of post–Cold War South–South cooperation, Cuba's aims were both ideological and economic, as compensated solidarity (Guerra Rondón: 2020) or compensated collaboration (Ruiz Cumplido, 2015: 155) became a business with its own institutions and agency dedicated to collecting repayment for the human resources Cuba sent to many neighbouring countries and around the world. In 2019, the year before the pandemic, the island participated in 250 actions, projects and cooperation programmes, mostly bilateral South–South cooperation in the health and education fields (SEGIB, 2021: 156)

The alliance with Venezuela, which began with Hugo Chávez's first official trip to the island in 2000, led Cuba's presence in the region to grow substantially. The initial bilateral agreements signed were expanded and, in 2004, the two countries launched the ALBA South–South cooperation initiative, which sought to develop an alternative development model to the liberalism of the US-led FTAA project (Gratius

and Puente, 2018). The main goal of the ALBA alliance, which is made up of nine countries (Bolivia, Cuba, Nicaragua, Venezuela and five Caribbean nations) was to create a counter-hegemonic unit to oppose the United States (Toro, 2011). Much more effective in terms of visibility and as a “rebel countries” brand (Escudé and Schenoni, 2016) than as a South–South cooperation initiative, its main limitations have been a top-down governmental approach and the unfeasibility of many proposed projects, including the adoption of a common currency (impossible to achieve without transferring sovereignty to supranational institutions).

ALBA was most notable for its annual summits. At these events, leaders who were ideologically sympathetic to Cuban socialism demonstrated unity and cooperation that extended to ALBA member countries and particularly its strategic ally Venezuela. In its early years, the Cuba-designed, Venezuela-funded ALBA initiative increased the visibility, presence and soft power of the Castro regime among participating countries and the rest of the region, who either sought rapprochement or opposed the project (Benzi, 2016).

The ideological division of the region that occurred after ALBA emerged had both costs and benefits. On the one hand, the counter-hegemonic alliance led by Cuba and Venezuela demonstrated their ideational and material power, as well as their capacity to resist the United States, and at the Summit of the Americas in Bariloche, Argentina in 2005 it halted the FTAA project. On the other hand, ALBA brought an ideological polarisation to the region that ultimately led to the dissolution of UNASUR due to a confrontation between Bolivia and the countries with conservative governments. It also caused a crisis in CELAC that remains ongoing, although the summit on September 18th 2021 in Mexico may suggest a new, more autonomous political direction, in line with Cuban and Venezuelan foreign policy (Mansilla, 2021). The binational alliance was highly beneficial to Cuba, as it increased its presence on the continent and, in economic terms, allowed it to guarantee high income from reselling oil received in exchange for the Cuban human resources sent to Venezuela, an exchange that until 2013 made up 40% of Cuba’s total trade (Gratius and Puente, 2018).

ALBA brought an ideological polarisation to the region that ultimately led to the dissolution of UNASUR.

4.3. The fourth stage of South–South cooperation or its end?

Cuba has been exporting its professional services (mainly doctors and teachers) to third countries in Africa, Latin America and Asia for decades, and during the COVID-19 pandemic sent 3,800 healthcare professionals to 39 countries, including Italy (Guerra Rondón 2020: 2). However, Cuba’s prospects of continuing to play a leading role in South–South cooperation have been diminished by both the hardships the island has suffered during the COVID-19 pandemic and ALBA’s existential crisis, as its main funder, Venezuela, enters economic and financial collapse, making the organisation’s continuity unsustainable (Gratius and Puente, 2018). On the other hand, having developed its own vaccines, which it will commercialise in the Global South, opens up new horizons for the Cuban biotechnology and health sector, which, despite its decline in recent years, remains at the vanguard in LAC. Unlike many other countries in the region, Cuba has a universal healthcare system. Despite the continuing exportation of medical services reducing national

More diversified relationships with the region and third states are emerging as a survival strategy.

coverage, Cuba still had nine doctors per 1,000 inhabitants in 2019, while the average for the region is 2.1 doctors per 1,000 inhabitants (Oficina Nacional de Estadísticas, ONE, Cuba).

Cuba's active engagement in South–South cooperation has both advantages and disadvantages. In the first and second phases, it was a means of attempting to spread the Revolution to other countries, but above all to gain ideational and material power (through its alliances with the USSR and Venezuela). However, it was also a risky bet, as shown first by the USSR's sudden and unexpected disappearance and later by the political, economic and social crisis enveloping Venezuela. In both cases, Cuba's material dependence on Soviet and Venezuelan oil, which it resold on the international market in exchange for foreign currency, was highly significant: between 1972 and 1990, 90% of Cuban trade was with the USSR and between 2003 and 2013, 40% of Cuban GDP depended on the exchange of human resources for Venezuelan oil. Unsurprisingly, more diversified relationships with the region and third states are emerging as a survival strategy (Gratius, 2019).

5. Assessing the special insertion model

In 2021, Cuba is a country that is politically integrated in LAC but economically distant from regional integration projects due to its socialist system, which prevents it from participating in free trade agreements or economic integration processes. As such, Cuba is not part of CARICOM or any other regional initiative with these characteristics. Another peculiarity is its exceptional position in and partial exclusion from the inter-American system. Since 2009 it has been part of the Summits of the Americas, but it is not a member of the OAS and it does not receive credits and/or projects from the IMF, the World Bank or the Inter-American Development Bank. It does however participate in the PAHO, and has played an active and important role during the COVID-19 pandemic.

Cuba falls between two stools: on the one hand, it is part of several continental initiatives (the Summits, PAHO), while on the other it denounces the US sanctions and democratic conditionality that prevent it from fully inserting itself into the inter-American system. It could, theoretically, be part of the OAS, but it prefers to avoid discussion and facing the opposition of the many countries led by the US on the subject of its one-party political system, which certainly neither meets nor aspires to meet the criteria of a liberal democracy. Until structural political changes take place on the island or the US lifts its embargo, Cuba will continue to occupy a *sui generis* place in the inter-American system.

Even so, it is a country that is wholly integrated in LAC and a full member of CELAC whose links with regional organisations in the Caribbean are growing. It is also among the most active countries with the largest number of South–South cooperation projects (SEGIB, 2021) in Africa and Latin America. Its active role in regional (ALBA) and global (Africa and other regions) South-South cooperation and its multilateral commitment, as a founding member of the UN and participant in the NAM, the G-77 and the São Paulo Forum, all combine to bolster its regional presence and give it a proactive foreign policy that other larger countries lack.

The key characteristics of Cuba's sui generis insertion model are its mix of political and ideological alliances based on the socialist system, a disproportionately large regional and international commitment for the small size of the island, and its resilience and marked anti-imperialism on the Latin American and global stage. The advantages are the island's regional and international presence and influence and its ability to forge alliances with countries of greater size and/or strategic weight that, while asymmetrical, have at least temporarily assisted the government in preserving its socialist system. South–South cooperation and resistance to US harassment have helped mould the island's international image of resilience in the face of a very powerful "enemy", which has incentivised other anti-hegemonic or anti-imperialist policies, as embodied, regionally, in the ALBA alliance.

Despite Washington's pressure, Cuba has achieved full diplomatic recognition from all the countries in the region. With the US ultimately isolated by its diplomatic breakdown with the island, then Democratic President Barack Obama decided to put an end to the policy and rekindle relations with Havana, an important step dramatised by a historic visit to Cuba in 2015. This important decision, which despite the additional sanctions imposed on Cuba was not reversed under President Trump, was primarily the result of Latin American pressure (particularly from Brazil). When the continent's electoral map underwent a conservative shift just a few years later the balance tipped against Cuba once again.

The politically driven commitment to regional and international insertion had great economic benefits while the alliances with the USSR and Venezuela lasted, but high costs were incurred when these strategic relations disintegrated. This has been reflected in a deep recession over the past eight years, with GDP falling in 2020 by a historic 10.9% and an inflation rate that, according to official ONE data, reached over 178% in October 2021 and an interannual rate of 66%.¹⁴ The political pillars of Cuba's insertion model (autonomy, South–South cooperation, anti-imperialism) appear to be somewhat contradicted by the economic pragmatism of trading with countries and entities that are not ideological allies of the Cuban Revolution. Nor are they consistent with extreme dependence on the outside world, as is the case with tourism forming the main source of GDP and the need to import 75% of food, conditions that Cuba shares with many of its Caribbean neighbours. Meanwhile, contrary to its discourse of autonomy, the alliances with non-socialist countries have forced Cuba to adapt its economy to the demands of global capitalism – albeit in a way that was controlled and tutored by the government – and take on new dependencies and asymmetries.

Despite these setbacks, Cuba shows that there is more than one path to regional insertion in the Americas. The route Cuba has taken combines capitalist instruments with alternatives like South–South cooperation, while also seeking out ideologically similar allies with greater material capacity in order to achieve insertion in its neighbourhood and the wider world without losing its own identity. In this sense, Cuba's regional insertion has been pragmatic. The socialist nature of the regime has not been renounced and political impositions with practical implications for its own political system have not been accepted. The insertion is

The politically driven commitment to regional and international insertion had great economic benefits while the alliances with the USSR and Venezuela lasted, but also high costs.

14. ONEI: <http://www.onei.gob.cu/publicaciones-tipo/Serie>

Cuba will need external cooperation to overcome a multidimensional crisis and the major difficulties it has accessing financial resources.

incomplete, sectoral and intermittent, in order – from the government's point of view – to avoid jeopardising the foundations of the Revolution: the one-party system, majority state ownership, control over society and the absence of foreign interference in domestic affairs. In the economic sphere, the need to survive has brought significant, but very slow concessions to capitalism (both internal and external), including long periods of adaptation and reflection that preserve the essence of a socialist or state-centric economy (Alonso and Vidal, 2020, link), and produce a complex interaction between state structures and private initiative wherever it is allowed to operate.

Any assessment of the success of Cuba's insertion model must therefore be mixed. On the one hand, it has acquired considerable soft power through the export of medical services and other human resources within the framework of South-South cooperation. This has helped preserve the reputation of the social pillars of the Revolution. On the other hand, its political system has brought costs in the form of the US sanctions that have forced Cuban governments to seek risky alternatives. A difficulty obtaining international credit is among them. This has been severe and is partially responsible for the public discontent that broke out in a wave of protests throughout the country on July 11th 2021, although there were many other factors, including the inefficient planning system and the dependence on imports for basic necessities (Welp, 2021; Whitehead/Hoffmann, 2021).

In the immediate future, Cuba will need external cooperation to overcome a multidimensional crisis and the major difficulties it has accessing financial resources to help tackle its growing fiscal deficit. Its greater integration into regional cooperation structures and the changes in the EU's international cooperation with the region may help it access previously unavailable funds and instruments. Meanwhile, due to its active role in South-South cooperation, Cuba is a privileged partner for triangular cooperation projects with the EU, particularly in Africa. It is also an important partner for greater bi-regional collaboration to fight the COVID-19 pandemic. On the other hand, Cuba's full participation in regional and interregional cooperation schemes continues to be held back by two of the political and economic pillars of the socialist regime that the Constitution declares untouchable. But there is room to increase flexibility and improve insertion to bring an end to the extreme dependence of previous eras.

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