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LABORALES Y SINDICALES

RESEARCH REPORT

COMPREHENSIVE DIAGNOSIS OF CUBA'S TOURISM SYSTEM

Technical Basis for a National Policy for
Tourism Modernization and Transformation
in a Democratic Transition Scenario



DECENT WORK
AND RIGHTS



ENVIRONMENTAL
SUSTAINABILITY



GOVERNANCE AND
TRANSPARENCY



DATA, EVIDENCE
AND ACCOUNTABILITY



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Comprehensive Diagnosis of Cuba's Tourism System

Technical Basis for a National Tourism Modernization and Transformation Policy in a Democratic Transition Scenario

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About the Observatory

The ODLS is an initiative dedicated to monitoring, documenting, and analyzing the situation of labor, trade union, and social rights in Cuba. Through research, technical reports, and specialized studies, the Observatory seeks to generate independent evidence that contributes to understanding the national reality, strengthens public debate, and supports researchers, civil society organizations, and international bodies.

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Executive Summary

Cuba's tourism system is experiencing a structural crisis of competitiveness, international confidence, critical infrastructure, and capacity to generate local income. The decline in visitors cannot be adequately explained by a single factor. Available evidence shows an interaction between internal constraints - deteriorating services, the energy crisis, low transparency, institutional rigidity, weak productive linkages, and labor restrictions - and external factors - sanctions, changes in connectivity, air travel costs, regional competition, and climate shocks.

Cuba's National Office of Statistics and Information reported 2,604,092 travelers and 1,810,663 international visitors through December 2025. International visitors represented 82.2% of the 2024 level, an absolute decline of 392,454 people. Canada was the leading source market, with 754,010 visitors, followed by the Cuban community abroad, Russia, the United States, and Mexico. This concentration exposes the destination to changes in connectivity, reputation, regulatory restrictions, and the spending capacity of specific markets.

Cuba retains distinctive tourism assets: nine properties inscribed on UNESCO's World Heritage List, 230 protected-area records in Protected Planet, wetlands, reefs, historic cities, rural landscapes, music, cultural heritage, gastronomy, diaspora tourism, and a strategic location in the Caribbean. However, these assets do not automatically translate into development. Generating sustainable value requires carrying-capacity rules, community consultation, income traceability, environmental protection, decent employment practices, and destination governance.

The labor dimension is a condition of competitiveness, not a social add-on. State labor intermediation in foreign-investment activities, restrictions on trade union pluralism, and the absence of robust sectoral labor data limit productivity, wage transparency, collective bargaining, and fundamental rights. Tourism modernization must include direct employment with safeguards, independent inspection, labor observatories, certified training, protected grievance mechanisms, and genuine participation by workers and communities.

This diagnosis is compounded by a recent development of major significance: the exit, reduction, or termination of operations by foreign hotel chains that for decades participated in the commercial operation of Cuban tourism through management, marketing, hotel administration, or association agreements with state entities. In July 2026, Meliá Hotels International informed Spain's National Securities Market Commission that its subsidiary Ilha Bela Gestão e Turismo would, as of July 24, 2026, cease providing hotel management and marketing services for all its establishments in Cuba. EFE reported that Meliá operated 34 hotels in Cuba and that the decision was related to operational, legal, economic, and financial difficulties in the country.

This development should be analyzed not only as a business decision, but also as a symptom of exhaustion in a tourism operating model based on centralized state control, mandatory labor intermediation, low contractual transparency, trade union restrictions, exposure to international sanctions, deterioration of critical infrastructure, and declining operational confidence. In a democratic transition scenario, the exit of these chains may have significant effects: hotels without operators, loss of international marketing channels, deterioration of assets, harm to workers and suppliers, contractual claims, potential property disputes, and demands for labor remedy.

The central recommendation is not to restart tourism growth through hotel megaprojects without prior diagnosis. Priority should be given to producing reliable data, auditing assets, stabilizing critical services, reforming the labor framework, enabling low-risk enterprises, making contracts transparent, protecting natural areas, and launching independently evaluated environmental, community-based, cultural, and rural tourism pilots. Without these foundations, any quantitative recovery in visitor numbers will be fragile and may reproduce economic concentration, labor precarity, and environmental harm.

Glossary of Acronyms and Technical Terms

To facilitate the technical reading of the report and avoid conceptual ambiguity, the following glossary brings together relevant acronyms and terms. It includes the institutional, legal, labor, environmental, economic, and tourism terminology used throughout the document, including English-language concepts commonly employed in international studies of tourism, sustainability, responsible investment, and governance. Its purpose is to provide a quick reference so readers can understand the scope of each term within the diagnosis, particularly when addressing freedom of association, employment arrangements, democratic transition, corporate due diligence, environmental carrying capacity, destination management, and the responsibility of domestic or foreign tourism operators.

ACRONYM OR TERM	DESCRIPTION
ASIC	Independent Trade Union Association of Cuba. Independent trade union organization that has submitted communications to international bodies on freedom of association and labor rights.
CEACR	ILO Committee of Experts on the Application of Conventions and Recommendations. Examines the application of conventions ratified by States.
CFA	ILO Committee on Freedom of Association. Body that examines complaints concerning freedom of association.
CTC	Workers' Central Union of Cuba. Official trade union center recognized by the Cuban State.
EIA	Environmental Impact Assessment. Technical study used to identify, prevent, mitigate, and compensate for the environmental impacts of projects.
ONEI	National Office of Statistics and Information of Cuba. Official national statistics agency.
ILO	International Labour Organization. Tripartite United Nations agency specializing in international labor standards.
UNDP	United Nations Development Programme. Multilateral organization for sustainable development cooperation.
OSH	Occupational Safety and Health. System for preventing occupational accidents, diseases, and risks.
UNESCO	United Nations Educational, Scientific and Cultural Organization. Administers the World Heritage List.
UNEP-WCMC	United Nations Environment Programme World Conservation Monitoring Centre. Manages global protected-area data together with Protected Planet.
WDPA	World Database on Protected Areas. Global database on protected areas.
Benchmarking	Structured comparison with similar destinations or countries to identify transferable practices, gaps, and adaptation risks. It does not imply copying models.
Stakeholders	Actors interested in or affected by a policy or project: workers, communities, businesses, the State, visitors, suppliers, academia, and social organizations.

ACRONYM OR TERM	DESCRIPTION
Governance	The set of rules, institutions, incentives, and mechanisms for participation and accountability through which decisions are made.
Carrying capacity	The maximum level of visitors or activities a site can accommodate without unacceptable environmental, social, or cultural deterioration.
Due diligence	Process of identifying, assessing, and mitigating legal, labor, environmental, financial, and reputational risks before an investment or contract.
Green bonds	Debt instruments intended to finance projects with verifiable environmental benefits.
Low-impact tourism	Tourism model that seeks to minimize resource consumption, waste, emissions, territorial pressure, and impacts on communities.
Destination Management Organization (DMO)	Territorial entity that coordinates destination promotion, quality, data, sustainability, participation, and management.
MSMEs	Micro, small, and medium-sized enterprises. In tourism, these include accommodations, food services, guiding, transportation, culture, and complementary services.
CNMV	Spain's National Securities Market Commission. Supervisory authority for Spanish securities markets. Its public disclosures make it possible to verify relevant information from listed companies, including corporate decisions concerning international operations.
Hotel management contract	Agreement under which an operating company manages, markets, or provides management services for a hotel that may be owned by another entity. In Cuba, foreign hotel chains have used such contracts in relation to state entities.
Hotel operator	Company responsible for managing, marketing, operating, or using a hotel brand at a tourism establishment. It may own the asset or simply manage the hotel.
Beneficial owner	Natural person or structure that directly or indirectly controls, receives economic benefits from, or exercises decisive influence over a company, contract, or asset. Identifying the beneficial owner is essential to prevent corruption, opacity, and rent capture.
Corporate responsibility for human rights	Responsibility of companies to identify, prevent, mitigate, and address adverse human rights impacts arising from their operations, business relationships, or value chains.
Human rights due diligence	Ongoing process through which a company identifies, assesses, prevents, mitigates, and accounts for human rights risks and impacts, including labor rights, freedom of association, non-discrimination, and working conditions.
Operational continuity	Set of measures designed to prevent an operator's exit, a contractual crisis, or an institutional transition from causing abrupt service closures, massive job losses, asset deterioration, or serious harm to users and communities.

Methodology, Sources, and Limitations

The document uses a mixed diagnostic methodology combining documentary review, regional comparison, causal analysis, identification of information gaps, scenario design, and formulation of a roadmap. Quantitative information is classified according to availability and reliability as verified facts, estimates, analytical inferences, hypothetical scenarios, unavailable data, and data of limited reliability.

CATEGORY	OPERATIONAL DEFINITION	USE IN THE REPORT
Verified fact	Data supported by an identifiable and traceable source.	International visitors reported by ONEI; number of UNESCO World Heritage properties; protected areas registered in Protected Planet.
Estimate	Approximate calculation based on partial data and explicit assumptions.	Recovery, investment, or employment scenarios when complete data are unavailable.
Analytical inference	Reasoned conclusion based on indirect evidence.	Relationship among power outages, connectivity, and destination reputation.
Hypothetical scenario	Planning assumption, not a prediction.	Democratic transition and institutional reforms by time horizon.
Data unavailable	Information not found in verifiable public sources.	Occupancy by tourism hub, updated average expenditure, physical condition of assets.
Limited reliability	Useful but partial, unaudited data or data without a complete methodology.	Press reports, official statements without a complete time series, or sector data without disaggregation.

The main limitation is the absence of a comprehensive, audited public database capable of measuring Cuba's tourism system with sufficient granularity. Updated series are lacking on hotel occupancy, tourism expenditure by market, physical condition of facilities, profitability, real wages, occupational safety and health conditions, participation by private enterprises, environmental footprint, and productive linkages.

Methodological Note on Foreign Hotel Operators

Information concerning the exit of foreign chains, labor allegations, withheld payments, contractual claims, and alleged commercial exploitation of tourism assets must be classified with particular caution. For purposes of this report, verified facts are those supported by official communications from listed companies, regulatory authorities, audited financial statements, or institutional sources. Press reports with an identified source are considered medium-reliability reports. Allegations concerning discrimination, labor exploitation, wage withholding, use of confiscated properties, or contingency funds for litigation are considered pending verification when they are not yet supported by independent documentary, judicial, or accounting evidence. This distinction is essential to avoid both impunity and attribution without individualized evidence.

Quantitative Baseline

The baseline is constructed from the official ONEI data available for 2024 and 2025. The source uses information from the Directorate of Identification, Immigration and Foreign Nationals and defines an international visitor as a person who visits a country other than their usual country of residence for a period not exceeding one year, without engaging in remunerated activity in the country visited.

Monthly performance makes it possible to observe seasonality, breaks, and months of greater operational pressure. In 2025, the series shows a relatively stronger first quarter, a marked decline from May through October, and a partial recovery toward November and December.

Chart 1.

Monthly Arrivals of International Visitors to Cuba, 2025

 = 10,000 visitors

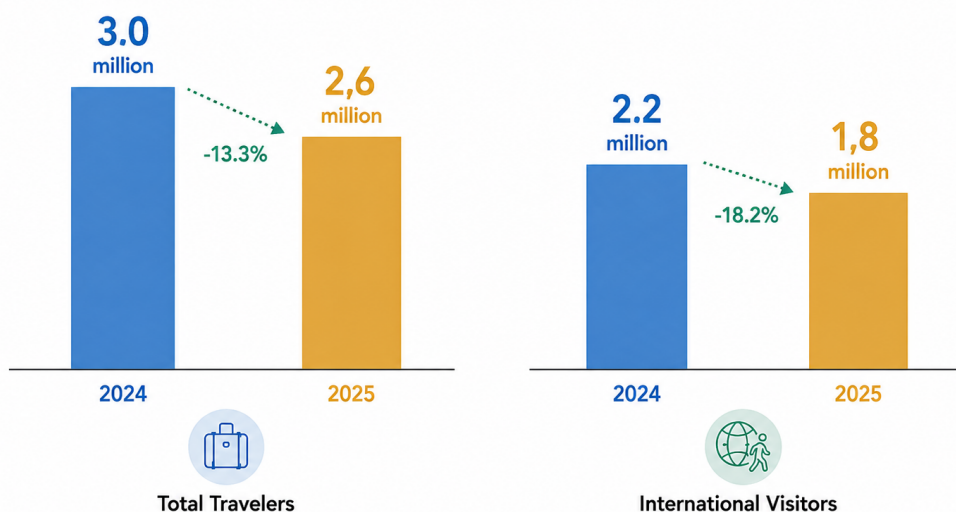


Source: ONEI, Arrivals of Travelers. International Visitors. December 2025 Closing Report.

The chart confirms that the problem is not merely one of annual volume. The decline during the middle months of the year reduces occupancy, labor income, local purchases, and supplier liquidity. The year-end recovery does not offset the structural weakness accumulated during the rest of the period. Comparing total travelers with international visitors distinguishes the broader category of international mobility from the central tourism indicator. This distinction prevents overestimating effective tourism demand.

Chart 2.

International Travelers and Visitors: Comparison 2024–2025



Source: ONEI, Arrivals of Travelers. International Visitors. December 2025 Closing Report.

In 2025, total travelers were equivalent to 86.6% of the 2024 level, while international visitors were equivalent to 82.2%. The decline in visitors is more pronounced than the decline in travelers, suggesting a significant contraction in tourism demand itself.

The structure of source markets makes it possible to assess dependence, commercial risk, and the need for diversification. Concentration in a small number of markets increases the destination's exposure to regulatory decisions, air connectivity, travel advisories, and perceptions of quality.

Chart 3.
Cuba's Main Source Markets, 2025

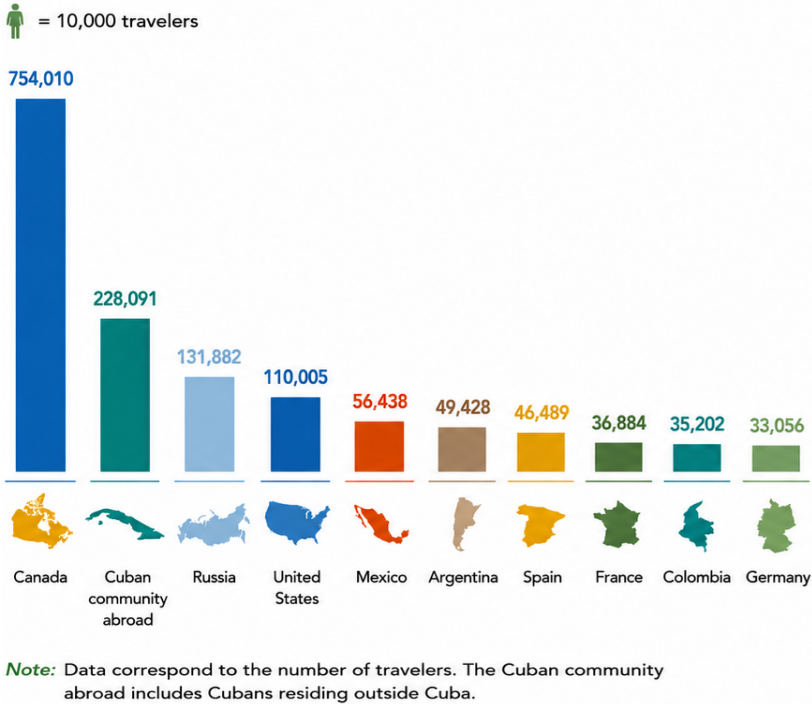
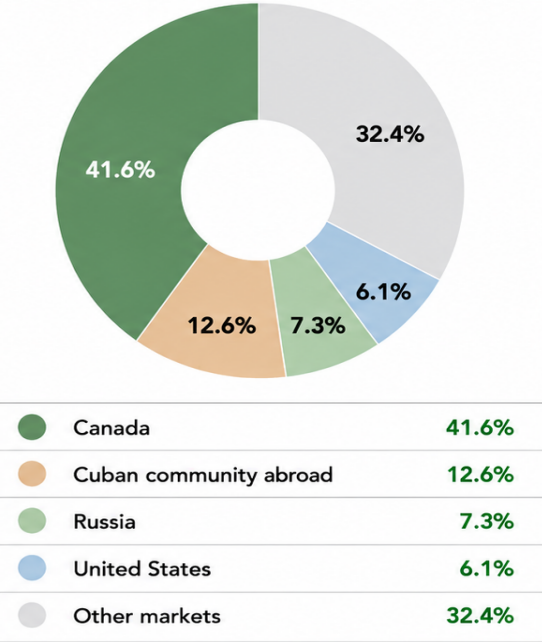


Chart 4.
Composition of International Visitors by Market, 2025



Source: ONEI, Arrivals of Travelers. International Visitors. December 2025 Closing Report.

Canada remains the dominant market. The Cuban community abroad, Russia, and the United States complete the critical demand group. This composition requires a differentiated strategy: recovery of traditional markets, diaspora tourism, diversification toward Latin America, and improved confidence among European operators.

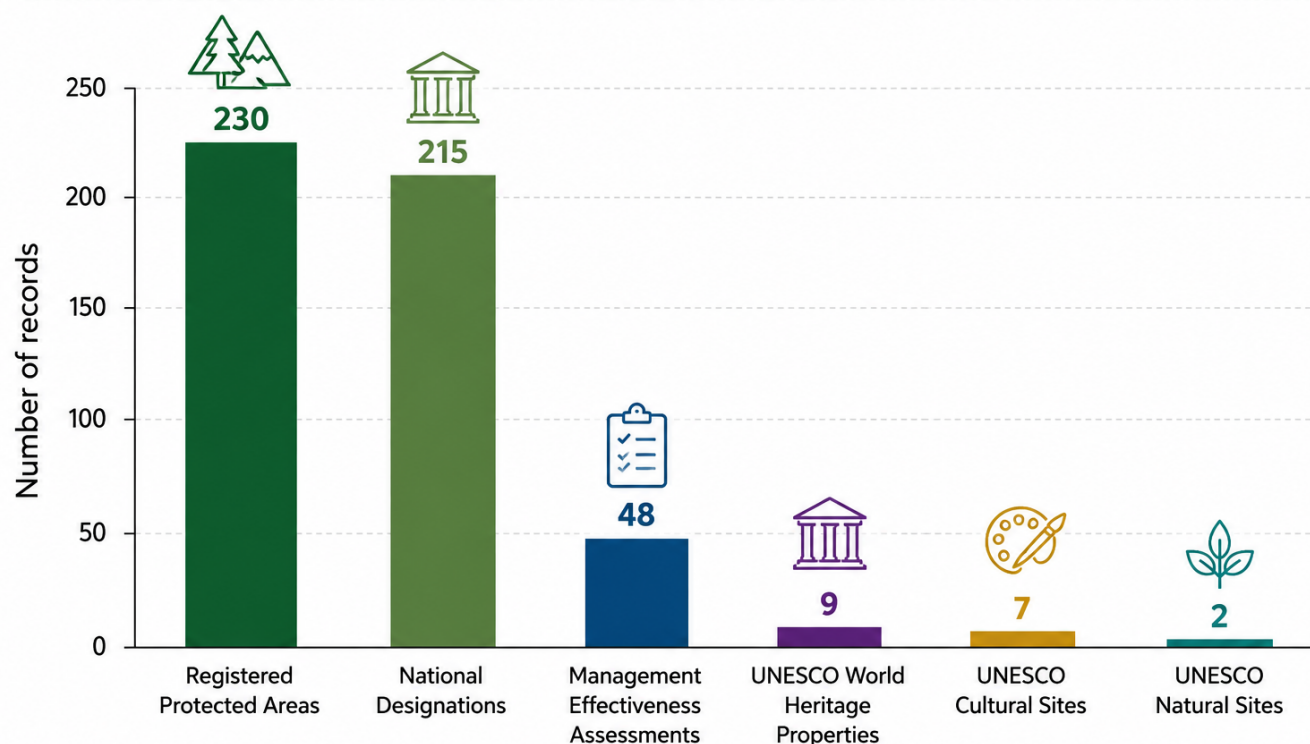
The relative share of markets makes it possible to assess the vulnerability of the tourism portfolio. When a single market carries excessive weight, the destination is exposed to external shocks beyond its control.

Canada accounts for the largest share of international visitors. The weight of markets associated with the diaspora, Russia, and the United States confirms that recovery will depend not only on tourism promotion, but also on connectivity, payment systems, service quality, international reputation, and migration regulations.

Tourism diversification requires identifying environmental and cultural assets supported by documentary evidence. This chart does not measure tourism quality or carrying capacity; it shows only the baseline of available heritage and environmental records.

Chart 5.

Documented Natural and Heritage Assets



Source: UNESCO World Heritage Centre; Protected Planet / UNEP-WCMC, Cuba profile, July 2026.

Cuba has a significant base of protected areas and heritage properties. This base can support environmental, cultural, scientific, and community-based tourism, provided that territorial planning, visitor controls, ecological monitoring, local benefit rules, and mechanisms to prevent gentrification or rent capture are in place.

The problem tree organizes the relationship among visible symptoms, immediate causes, structural causes, and effects. Its purpose is to avoid superficial diagnoses that confuse declining visitor numbers with the sole cause of deterioration.

The central problem is the loss of tourism competitiveness and redistributive capacity. The symptoms - fewer visitors, deteriorating services, and talent loss - are explained by a combination of internal and external constraints. The structural roots point to governance, labor rights, economic incentives, infrastructure, and limited territorial autonomy.

Systemic Diagnosis

Demand, Supply, and Connectivity

Cuban tourism demand is in a phase of contraction and declining regional competitiveness. The decline in 2025 compared with 2024 follows an insufficient post-pandemic recovery. Unlike other Caribbean destinations that recovered or exceeded 2019 levels, Cuba remains below its historical potential. This gap has consequences for foreign exchange earnings, employment, business liquidity, and fiscal capacity.

The tourism supply combines formal hotels, private accommodation, food services, transportation, guides, cultural activities, diaspora tourism, and complementary services. However, the available public information does not make it possible to measure, with sufficient reliability, occupancy by tourism hub, the condition of assets, service quality, cost structures, or profitability. The absence of these data prevents technically sound decisions about which hotels should be rehabilitated, which should be repurposed, and where investment should be prioritized.

Critical Infrastructure

Tourism depends on non-tourism systems: energy, water, sanitation, waste management, roads, airports, ports, telecommunications, digital payments, and food supplies. When these systems fail, the entire destination loses reliability. Hotel operations based on isolated solutions, such as private generators, do not resolve the visitor experience or the local supply chain.

Productive Linkages

The main economic opportunity of tourism lies not only in selling hotel nights, but also in multiplying local purchases, employment, and entrepreneurship. Linkages with agriculture, sustainable fishing, culture, transportation, technology, construction, professional services, and the creative economy remain weak when local suppliers lack credit, inputs, logistics, legal certainty, timely payments, and regulated access to imports.

Governance and Data

The current model is characterized by high centralization, limited contractual transparency, and weak independent evaluation mechanisms. In a modern tourism policy, data are not a secondary product: they are institutional infrastructure. Without reliable series on occupancy, expenditure, employment, wages, quality, environmental footprint, and local procurement, investment decisions remain vulnerable to arbitrariness, propaganda, or capture by vested interests.

Foreign Commercial Hotel Operations, Management Contracts, and the Exit of International Operators

For decades, a significant part of Cuba's tourism industry developed through management, marketing, hotel administration, or partnership agreements between Cuban state entities and foreign operators, particularly Spanish, Canadian, and other international hotel chains. This model allowed the regime to gain access to international brands, marketing channels, hotel operating standards, and foreign source markets. However, it also consolidated a system characterized by high contractual opacity, limited traceability of benefits, restricted worker participation, state labor intermediation, and few public mechanisms for citizen oversight.

The exit or reduction of operations by foreign hotel chains in 2026 constitutes a critical development for this diagnosis. Meliá Hotels International's disclosure to the CNMV confirmed that its subsidiary Ilha Bela Gestão e Turismo would, as of July 24, 2026, cease providing hotel management and marketing services for all its establishments in Cuba. EFE reported that the company operated 34 hotels on the island and that the decision was related to operational, legal, economic, and

financial difficulties in the country. Reuters subsequently reported that Meliá recorded a net loss of €7.5 million in the first half of 2026, attributed primarily to the termination of its operations in Cuba.

This development should not be interpreted solely as a business adjustment resulting from external sanctions. It should also be understood as a symptom of an institutionally fragile tourism model dependent on foreign operators, non-transparent contracts, deteriorating infrastructure, limited foreign exchange availability, an energy crisis, connectivity difficulties, poor service quality, and the absence of fully verifiable labor guarantees. The departure of operators may deepen the destination's crisis if it leaves hotels without management, brands, access to international reservation systems, adequate maintenance, or effective protection for workers and suppliers.

The report distinguishes between verified facts, press reports, and allegations pending verification. Meliá's departure is documented in a public disclosure to the CNMV. Allegations

concerning labor exploitation, political discrimination, racial discrimination, wage withholding, or contingency funds for potential lawsuits should be treated as information relevant to a legal, labor, and corporate research agenda, but not as judicially established facts unless supported by audits, court rulings, contracts, payroll records, proof of payment, or independently verified testimony.

The relevance of this issue to a democratic transition is direct. A future democratic government would inherit not only

tourism assets, but also terminated or ongoing contracts, deteriorated hotels, potential investor claims, affected workers, unpaid suppliers, disrupted commercial channels, possible property claims, and a labor architecture built on state intermediation. Any national tourism transformation policy must therefore include a specific review of the contractual, labor, property, and environmental legacy of foreign hotel operations in Cuba.

Labor, Labor Rights, and Human Capital

Tourism is labor-intensive, and its competitiveness depends on human capital. Receptionists, housekeepers, cooks, technicians, guides, musicians, transportation workers, gardeners, cleaning staff, maintenance personnel, divers, instructors, and community-based suppliers determine the visitor experience. A tourism policy without labor rights will be unstable and characterized by low productivity.

Within the foreign investment framework, Law No. 118 maintains a model under which Cuban workers are hired through authorized employing entities, with limited exceptions. This architecture restricts the direct employment relationship, reduces wage transparency, and hinders effective bargaining. From a labor rights perspective, tourism transformation must include direct employment with safeguards, freedom of association, collective bargaining, occupational safety and health, protection against retaliation, independent inspection, and grievance mechanisms.

The departure of foreign hotel operators reinforces the need to review Cuba's tourism labor model. State intermediation not only limits the direct relationship between worker and company but also makes it difficult to reconstruct the traceability of payments, responsibilities, benefits, contributions, tips, working conditions, and potential differences between the amounts paid by international operators and those actually received by workers. In a democratic transition, this traceability will be essential to assess potential labor claims and determine whether practices involving discrimination, exclusion on political grounds, violations of freedom of association, occupational safety and health failures, or wage-related harm occurred.

A special labor documentation and claims mechanism should be established for tourism workers who provided services in hotels operated by foreign chains through state employment entities. This mechanism should not begin from a presumption of wrongdoing by companies, but neither should it automatically validate practices simply because they were permitted under Cuban legislation in force under the dictatorship. The standard must be evidentiary and technical: identify contracts, payroll records, payments made by operators, payments received by workers, margins retained by intermediary entities, personnel selection criteria, discrimination complaints, working conditions, occupational accidents, and guarantees of trade union representation.

A democratic tourism transition must ensure that every new hotel management, administration, or operating contract includes direct employment with safeguards, freedom of association, collective bargaining, traceable wages, non-discrimination, occupational safety and health, independent grievance mechanisms, and protection against retaliation. Without these conditions, the sector could recover visitor numbers without correcting the labor precarity that has historically affected those who sustain tourism activity.

ASIC documents submitted to the Observatory report concerns regarding trade union pluralism, genuine participation in labor consultations, harassment of independent trade unionists, and follow-up to Case No. 3271 before ILO supervisory bodies. These inputs do not replace a sector-wide labor survey, but they do justify including the trade union dimension as an institutional risk and as a condition for the legitimacy of any tourism transition.

LABOR DIMENSION	OBSERVED PROBLEM	PROPOSED MEASURE	MINIMUM INDICATOR
Employment	State labor intermediation and limited wage traceability	Gradual direct employment with labor guarantees	Percentage of workers with direct contracts and traceable wages
Freedom of association	Restrictions on pluralism and independent representation	Guarantees of association, collective bargaining, and protection against retaliation	Number of organizations, collective agreements, and complaints processed
Training	Gaps in languages, management, OSH, guiding, and sustainability	National certification system for tourism skills	Workers certified by occupation and territory
OSH	Risks in hotels, transportation, kitchens, diving, and maintenance	Independent labor inspection and sector-specific protocols	Accidents, occupational diseases, and corrective measures
Income	Gap between foreign currency generated and effective remuneration	Traceability of wages, tips, and commissions, and sectoral wage floors	Average real income by occupation
Participation	Workers excluded from destination decision-making	Destination councils with labor and community representation	Published minutes, decisions, and indicators

The matrix shows that the labor component should not be treated as social compensation following investment, but rather as a prerequisite for productivity, legitimacy, and sustainability. Tourism labor reform must advance alongside data, financing, infrastructure, and territorial governance.

The following complementary matrix identifies the main labor risks that may arise in Cuba's hotel sector in a democratic transition scenario, particularly for workers associated with hotels operated by foreign chains through contracts with state entities. Its purpose is not to automatically attribute responsibility to all international operators, but to organize the critical issues that will need to be verified through audits, documentary review, testimony, payroll records, contracts, and independent claims mechanisms.

The matrix is based on the central premise that the departure or reduction of operations by foreign hotel chains has not only commercial or property-related consequences, but also direct effects on workers, their income, employment stability, freedom of association, access to remedies, and eventual integration into a new tourism model based on direct employment, transparency, and decent work.

DIMENSION	IDENTIFIED RISK	EFFECT DURING TRANSITION	PROPOSED MEASURE	INDICATOR
Wage traceability	Undocumented difference between payments made by operators and payments received by workers	Labor claims, loss of trust, and collective disputes	Audit payments, payrolls, and employing entities	Percentage of hotels audited and discrepancies identified
Labor intermediation	Employment through authorized state entities	Difficulty establishing direct employer responsibility	Gradual transition to direct employment	Number of workers transitioned to direct contracts
Employment discrimination	Allegations of exclusion for political, trade union, racial, or family-related reasons	Potential claims for remedy	Independent complaint and verification mechanism	Complaints received, investigated, and resolved
Closure of operations	Exit of foreign chains and loss of hotel management	Unemployment, loss of tips, and reduced household income	Tourism workforce transition fund	Workers covered by temporary support or training

DIMENSION	IDENTIFIED RISK	EFFECT DURING TRANSITION	PROPOSED MEASURE	INDICATOR
Freedom of association	Absence of independent representation in hotels	Lack of genuine collective bargaining	Recognition of independent trade unions and sectoral bargaining	Collective agreements signed and organizations registered
OSH	Risks in kitchens, cleaning, maintenance, transportation, swimming pools, diving, and technical services	Accidents, occupational diseases, and corporate liability	Independent tourism labor inspection	Reported accidents and corrective measures
Associated suppliers	Loss of demand due to closure or low occupancy	Business failures and loss of indirect employment	Local procurement and credit program	Local suppliers linked to reopened hotels

The matrix demonstrates that the tourism transition cannot be limited to ensuring the continuity of hotels, brands, contracts, or investments. The most sensitive issue will be rebuilding the relationship between tourism operations and labor rights, particularly where state intermediation, limited wage traceability, absence of independent trade union representation, and dependence on supplementary income such as tips or foreign-currency payments existed.

The institutional response should therefore combine auditing, immediate protection, claims mechanisms, workforce transition measures, and new contractual rules for domestic and foreign operators. Only in this way will it be possible to prevent the departure of international chains from resulting in greater precarity for workers while also ensuring that a future tourism reopening does not reproduce the same practices of opacity, labor exclusion, and trade union subordination that characterized the previous model.

Caribbean Benchmarking and Comparable Destinations

Regional comparisons must be used cautiously. Cuba should not mechanically copy high-volume models that can generate coastal pressure, real-estate concentration, and limited local value capture. It can, however, learn from transferable practices: public data, connectivity, professional international promotion, transparent public-private partnerships, workforce training, destination management, and product diversification.

DIMENSION	CUBA	TRANSFERABLE REGIONAL LESSON	RISK OF MECHANICAL REPLICATION
Post-pandemic recovery	Weak recovery and decline in 2025	Rebuild confidence, connectivity, and basic service quality	Promoting the destination without resolving critical services
Tourism product	Sun-and-beach tourism, heritage, and underused natural assets	Diversify toward culture, nature, events, gastronomy, and diaspora tourism	Fragmenting the offer without standards
Governance	Centralization and incomplete data	Create destination management organizations with open data	Local capture by elites or operators
Labor	Intermediation and limited trade union autonomy	Link competitiveness to decent work	Liberalization without rights
Environment	High coastal and ecological sensitivity	Carrying capacity and environmental monitoring	Coastal overdevelopment
Entrepreneurship	Limited private and community potential	One-stop licensing and access to credit	Informality or concentration

Benchmarking shows that tourism recovery does not depend solely on natural attractions. Destinations capable of capturing demand sustain connectivity, quality, confidence, data, and investment rules. For Cuba, the opportunity is not merely to compete on volume, but to build a diversified territorial model that generates local value.

Environmental, Community-Based, and Social Tourism Strategy

Environmental, community-based, and social tourism can provide an opportunity for diversification, but it should not be idealized. It can generate local income and support conservation, but it can also lead to ecosystem overuse, cultural commodification, residential displacement, benefit capture, and precarious employment. Any pilot initiative must therefore begin with an environmental baseline, community consultation, revenue-sharing rules, visitor limits, and independent monitoring.

PILOT PROJECT	DESTINATION TYPE	INTERVENTION LOGIC	BENEFICIARIES	MINIMUM CONDITIONS	RISKS	INDICATORS
Birdwatching and wetlands	Wetlands and reserves	Certified local guides, daily visitor quotas, and conservation fees	Communities, guides, scientists	Species inventory and carrying capacity	Wildlife disturbance, waste	Visitors/day, local income, species monitored
Living urban heritage routes	Historic cities	Integrate family accommodations, gastronomy, music, traditional trades, and museums	Artists, guides, families, restaurateurs	Housing rules and gentrification controls	Overtourism and displacement	Local income, protected housing, satisfaction
Agroecological rural tourism	Rural landscapes	Link farms, local food, rural lodging, and education	Producers, cooperatives, young people	Food safety, transportation, and insurance	Poor sanitary quality, benefit capture	Agricultural sales, rural employment, local linkages
Diving and coral reef restoration	Reefs and coastal areas	Certified operators, dive limits, and coral monitoring	Instructors, former fishers, scientific centers	Environmental assessment, equipment, and insurance	Coral damage and accidents	Reef condition, quotas, conservation revenue
Memory and labor tourism	Urban/community	Educational routes on social history, labor, migration, and culture	Guides, academia, social organizations	Freedom of expression and protection of participants	Politicization or retaliation	Active routes, evaluations, community income

The proposed pilots do not invent figures or specific locations that have not been validated. They function as conceptual portfolios requiring technical verification, community consultation, and environmental assessment before implementation.

Economic and Financial Scenarios

Available public information does not allow for the construction of a complete financial model. Accordingly, formulas, critical variables, and scenarios are proposed. Projections must be validated using data on expenditure per visitor, occupancy, average daily rate, energy costs, asset condition, wages, local procurement, environmental carrying capacity, and connectivity.

VARIABLE	ILLUSTRATIVE FORMULA	REQUIRED DATA	CURRENT LIMITATION
Gross tourism revenue	Visitors × average expenditure per visitor	Expenditure survey and payment-method data	No robust, up-to-date public series
Direct employment	Operational rooms × workers per room	Operational inventory and payroll	No public data by tourism hub

VARIABLE	ILLUSTRATIVE FORMULA	REQUIRED DATA	CURRENT LIMITATION
Local capture	Tourism expenditure × percentage of local purchases	Audit of procurement and suppliers	No up-to-date public tourism input-output matrix
Investment gap	Rehabilitation + infrastructure + digitalization + training + climate adaptation	Technical audit and unit costs	No verifiable public inventory
Expected climate risk	Event probability × estimated economic damage	Risk maps and historical losses	Dispersed environmental data

These formulas do not replace a financial study. Their value lies in showing what information must be collected before committing public, multilateral, or private resources to a national tourism modernization portfolio.

SCENARIO	INSTITUTIONAL ASSUMPTION	TOURISM ASSUMPTION	EXPECTED OUTCOME
Conservative	Slow reforms, low confidence, and fragile critical services	Limited recovery of connectivity and isolated pilots	Partial stabilization with persistent informal employment
Baseline	Transparency, gradual labor reform, and evaluated pilots	Moderate recovery of traditional markets and partial diversification	Improved quality, local income, and formalization
Accelerated	Rule of law, legal certainty, responsible investment, and decentralization	Robust connectivity and a scalable environmental-cultural portfolio	Strong recovery with decent employment and resilience

Specific Scenario: Exit of Foreign Operators and Hotel Business Continuity

The departure of foreign operators introduces a critical variable into the economic and financial scenarios. In the short term, it may reduce international marketing channels, access to reservation systems, operating standards, occupancy, employment, and foreign exchange flows. It may also accelerate asset deterioration if hotels are left without maintenance or transferred to new operators without technical assessment. In the medium term, it may create an opportunity to redesign the hotel operating model according to criteria of transparency, competition, direct employment, corporate responsibility, local procurement, and environmental sustainability.

Under the conservative scenario, the departure of operators could result in prolonged hotel closures, job losses, physical deterioration, and litigation. Under the base scenario, a democratic State could stabilize strategic assets through interim administration, contractual audits, and transparent bidding. Under the accelerated scenario, the departure of traditional operators could create opportunities to attract responsible investment under new rules, promote national and regional operators, strengthen local enterprises, and diversify the model beyond large international chains. The essential condition for avoiding economic and social harm is that the transition neither improvise contract awards nor close assets without diagnosis. Each hotel must be classified according to operational viability, physical condition, environmental impact, labor situation, contractual status, territorial importance, and potential for productive linkages. The scenarios are not forecasts. They are tools for anticipating risks and dependencies. The accelerated scenario would be plausible only if institutional, labor, and environmental reforms advance at the same pace as investment and international promotion.

Institutional and Regulatory Design

The institutional architecture must combine national coordination, local autonomy, transparency, competition, environmental protection, and labor and community participation. The transition should not replace state concentration with private concentration. The objective is to build regulated markets, open data systems, effective labor rights, and democratic oversight of strategic assets.

INSTITUTION OR MECHANISM	FUNCTION	INITIAL MEASURES
National Tourism Transformation Authority	Coordinate policy, investment, data, and standards	Technical mandate, publication of data, and interministerial coordination
Destination Management Organizations	Territorial governance with local stakeholders	Councils including municipalities, workers, communities, businesses, and academia
Unified Tourism Registry	Formalize accommodations, food services, guides, transportation, nautical activities, and wellness services	Risk-proportionate licensing and digital procedures
Competition and Transparency Authority	Prevent concentration, corruption, and opaque contracts	Publication of concessions, beneficial owners, and obligations
Tourism Labor Inspection System	Protect rights, OSH, and collective bargaining	Complaint channels, inspections, and wage traceability
Environmental and Protected Areas Authority	Define limits, monitoring, and sanctions	Carrying capacity, zoning, and strategic environmental assessment
Tourism Audit, Continuity, and Remedy Commission	Review hotel contracts, assets, labor obligations, beneficial owners, property claims, corporate responsibilities, and conditions for operational continuity	Create contractual-property, labor-trade union, and environmental-territorial technical chambers; inventory hotels operated by foreign chains; preserve contracts, payrolls, and evidence; design remedy and continuity mechanisms

The proposed institutional architecture should also include a Tourism Audit, Continuity, and Remediation Commission, with a temporary mandate and independent technical composition. This commission would be responsible for reviewing the contractual, labor, property, financial, and environmental legacy of the previous tourism model, particularly in hotels operated by foreign chains or by state entities linked to the political-military apparatus.

The proposed commission could operate through three specialized technical panels:

- **The first, contractual-property**, would review management, administration, and marketing contracts; joint ventures; beneficial owners; assets used; potential claims by former owners; and disputes with investors.
- **The second, labor-trade union**, would document payments, payroll records, labor intermediation, discrimination complaints, occupational safety and health, freedom of association, and potential remediation mechanisms.
- **The third, environmental-territorial**, would assess the physical condition of hotels, coastal impacts, water and energy consumption, waste management, climate risks, and the conditions required for reopening or repurposing.

This commission should not become an instrument of retaliation or a mechanism for impunity. Its function should be to reconstruct economic and labor truth, preserve evidence, protect workers, ensure business continuity where viable, identify responsibilities on a case-by-case basis, and design rules for a new phase of responsible tourism investment. Companies that operated in Cuba should be assessed according to standards of due diligence, human rights, transparency, labor compliance, and environmental protection, without automatic condemnation or blanket validation.

The proposed institutional framework seeks to correct failures of coordination and oversight. Tourism requires a strong national authority for data and standards, but not absolute operational centralization. Destinations must have decision-making capacity, always within rules of transparency, participation, and evaluation.

Roadmap by Time Horizon

The following roadmap organizes priority actions for transforming Cuba's tourism system across four time horizons in order to distinguish urgent stabilization measures from those requiring institutional reform, sustained investment, and democratic consolidation. Its purpose is to prevent an improvised recovery based solely on international promotion or the accelerated reopening of hotels, and to propose a gradual sequence beginning with reliable data, asset audits, labor protection, contractual transparency, and critical services.

Under this approach, each horizon defines objectives, actions, responsible entities, and indicators that make it possible to move from containing the current crisis toward a competitive, decentralized, environmentally responsible tourism model based on decent work, community participation, and legal certainty.

TIME HORIZON	OBJECTIVES	PRIORITY ACTIONS	RESPONSIBLE ACTORS	INDICATORS
0-12 months: stabilization and transparency	Halt deterioration, produce reliable data, and protect workers	Asset census, monthly data publication, labor audit, business registry, critical services plan	Tourism, statistics, labor, environment authorities, and municipalities	Data published, assets audited, complaints addressed, pilots designed
		Inventory hotels operated by foreign chains; collect management and marketing contracts; immediately protect workers affected by closures; preserve payrolls, proof of payment, and employment records; review hotels without operators; establish a temporary operational continuity plan	Tourism authority, labor authority, audit commission, municipalities, independent trade unions, and accounting experts	Number of contracts collected; hotels inventoried; workers registered; employment records preserved; hotels classified by operational viability
1-3 years: reforms and pilots	Create rules for regulated opening and test territorial models	Licensing reform, gradual direct employment, destination management organizations, environmental pilots, training fund	Parliament, tourism, labor, economy, and environment authorities	Formal employment, pilots evaluated, local income, environmental compliance
1-3 years: reforms and pilots	Create rules for regulated opening and test territorial models	Implement direct employment requirements in new hotel contracts; create a special mechanism for tourism labor claims; publish new and renegotiated tourism contracts; define mandatory clauses on labor rights, freedom of association, due diligence, anti-corruption, and environmental sustainability; transparently tender viable hotels without operators	Parliament, tourism authority, labor authority, competition authority, audit commission, and municipalities	Contracts published; workers under direct employment; claims processed; open tenders completed; labor clauses incorporated
3-7 years: territorial scaling	Expand viable projects and modernize infrastructure	Selective rehabilitation, cultural and natural corridors, digitalization, MSME financing, water and energy infrastructure	National government, municipalities, destination management organizations, and private sector	Occupancy, average expenditure, local capture, conservation

TIME HORIZON	OBJECTIVES	PRIORITY ACTIONS	RESPONSIBLE ACTORS	INDICATORS
7-15 years: consolidation	Position Cuba as a competitive, inclusive, and resilient destination	Country brand, innovation, scientific tourism, climate resilience, sectoral collective bargaining	National authority, regions, businesses, trade unions, and communities	Diversification, productivity, decent employment, environmental footprint

The roadmap avoids the logic of immediate investment without prior diagnosis. The first horizon prioritizes transparency and protection; the second tests reforms; the third scales only what has been evaluated; and the fourth consolidates reputation, innovation, and financial sustainability.

Risk Matrix

The following risk matrix identifies the principal factors that may affect the recovery, modernization, and democratic transformation of Cuba's tourism system. Its purpose is to organize, preventively, the economic, labor, institutional, environmental, contractual, and territorial risks that could arise both during the current crisis and in a potential transition process.

The matrix should not be understood as a fixed prediction, but as a public management tool for anticipating critical scenarios, identifying warning signs, assigning responsibilities, and defining timely mitigation measures. In particular, it highlights that tourism recovery will depend not only on increasing visitor numbers, but also on the capacity to correct structural problems such as contractual opacity, labor precarity, the departure of foreign operators, asset deterioration, the energy crisis, pressure on ecosystems, and the lack of effective worker and community participation.

RISK	PROBABILITY	IMPACT	WARNING SIGNAL	MITIGATION	RESPONSIBLE ACTOR
Continued decline in tourism	High	High	Fewer flights and low occupancy	Critical services, confidence, and connectivity	Tourism/Transportation
Corruption in concessions	High	High	Opaque contracts	Public tendering and beneficial ownership disclosure	Comptroller/Competition authority
Coastal overdevelopment	Medium	High	Projects without environmental assessment	Land-use planning, selective moratorium, and carrying capacity	Environment/Municipalities
Labor precarity	High	High	Abusive subcontracting or non-traceable wages	Inspection and collective bargaining	Labor authority
Community capture by elites	Medium	Medium-high	Unrepresentative leadership	Consultation, social auditing, and transparent benefit-sharing	Municipalities
Degradation of protected areas	Medium	High	Visitor increases without quotas	Zoning, quotas, and monitoring	Parks/Environment
Territorial inequality	High	Medium	Investment concentrated in a few tourism hubs	Territorial funds and equity criteria	National government
Energy crisis	High	High	Power outages, insufficient fuel	Efficiency, renewables, and contingency plans	Energy/Tourism

RISK	PROBABILITY	IMPACT	WARNING SIGNAL	MITIGATION	RESPONSIBLE ACTOR
Exit of foreign operators	High	High	Contract termination, brand withdrawal, loss of reservation channels	Operational continuity regime, asset audit, and transparent tendering	Tourism authority / Audit commission
Hotels without maintenance or operators	High	High	Facility closures, physical deterioration, loss of standards	Viability classification, provisional administration, and rehabilitation plan	Tourism authority / Municipalities
Accumulated labor claims	High	High	Complaints concerning wage differences, discrimination, dismissals, or retaliation	Special labor claim and remedy mechanism	Labor authority / Independent trade unions
Litigation with foreign investors	Medium-high	High	Lawsuits, arbitration, blocked payments, or contractual disputes	Case-by-case review, conciliation, contractual transparency, and due process	Investment authority / Contractual commission
Property claims involving tourism assets	Medium	High	Claims by former owners or heirs	Property review commission, restitution or compensation	Property authority / Judiciary
Capture of new contracts by economic elites	High	High	Direct awards, lack of beneficial ownership disclosure, operator concentration	Public tendering, beneficial ownership registry, and competition oversight	Competition authority / Comptroller
Continuation of labor intermediation in new forms	Medium-high	High	Abusive subcontracting, opaque outsourcing, non-traceable wages	Prohibition of abusive intermediation, direct employment, and enforcement	Labor authority
Environmental damage from abandonment or accelerated reopening	Medium	High	Abandoned hotels, discharges, coastal deterioration, reopening without assessment	Environmental audit, carrying capacity, and conditional permits	Environmental authority

The most serious risk is not that tourism will fail to grow, but that it will grow badly - with opaque contracts, environmental pressure, labor precarity, and limited local value capture. The matrix should be updated every six months using implementation data.

Monitoring Indicator Dashboard

The following indicator dashboard proposes a minimum baseline for monitoring the evolution of Cuba's tourism system and assessing whether recovery and transformation measures produce verifiable results. Its purpose is to prevent tourism policy from being measured solely by the number of visitors, incorporating variables related to institutional quality, decent employment, contractual transparency, environmental sustainability, market diversification, productive linkages, and worker protection.

In a democratic transition scenario, this dashboard would allow periodic monitoring of progress, identification of early warning signs, correction of public policy decisions, and accountability by authorities, tourism operators, investors, and destination management organizations.

INDICATOR	BASELINE	TENTATIVE TARGET	SOURCE	FREQUENCY	RESPONSIBLE ACTOR
International visitors	1,810,663 in 2025	Sustained recovery without sacrificing quality	ONEI	Monthly	Statistics/Tourism
Visitors from the leading market	Canada: 754,010 in 2025	Reduce relative dependence	ONEI	Monthly	Tourism
Hotel occupancy	No robust public data available	Publication by tourism hub	Hotels/authority	Monthly	Tourism
Average expenditure	No robust public data available	National expenditure survey	Exit survey	Quarterly	Statistics
Formal tourism employment	No robust public data available	Sector registry	Social security/survey	Quarterly	Labor
Real tourism wages	No robust public data available	Measurement by occupation	Labor survey	Semiannual	Labor
Local supplier companies	Not available	Verifiable annual increase	Audited procurement	Semiannual	Economy/Tourism
Areas with defined carrying capacity	Partial	100% of pilots	Environmental authority	Annual	Environment/Parks
Labor complaints resolved	Not available	Operational system	Labor inspection	Quarterly	Labor
Contracts published	Not available	100% of new contracts	Transparency portal	Ongoing	Comptroller
Hotels with identified operator	No robust public data available	100% of tourism hotels classified	Audited tourism inventory	Semiannual	Tourism authority
Hotel contracts published	Not available	100% of new and renegotiated contracts	Transparency portal	Ongoing	Transparency authority
Hotels without operators with continuity plans	Not available	100% of strategic hotels evaluated	Audit commission	Quarterly	Tourism authority
Workers affected by operator exits	Not available	Complete census by hotel and occupation	Sector labor registry	Quarterly	Labor authority
Tourism labor claims processed	Not available	Operational system with maximum response times	Special claims mechanism	Quarterly	Labor authority
Contracts with freedom-of-association clause	Not available	100% of new hotel contracts	Contract portal	Ongoing	Labor authority / Tourism
Labor payment audits completed	Not available	Audit of priority hotels	Labor-trade union commission	Semiannual	Audit commission
Operators with verified due diligence	Not available	100% of new or renewed operators	Responsible investment registry	Annual	Investment authority

The dashboard combines indicators of volume, institutional quality, employment, sustainability, and transparency. Recovery should not be measured solely by visitor numbers; it should be measured by local income, labor rights, conservation, and confidence.

Missing Data and Research Agenda

The following table identifies information that is not yet publicly available in a complete or verifiable form but is essential for developing a serious tourism policy in a democratic transition scenario. Its purpose is to prevent decisions on investment, hotel reopening, labor protection, environmental sustainability, or community participation from being made on the basis of intuition, incomplete data, or particular interests.

This research agenda organizes the technical priorities of the process: what information must be collected, what the potential sources are, what methodology should be used, and the level of urgency of each data requirement for guiding the modernization of Cuba's tourism system with transparency, rigor, and social responsibility.

MISSING INFORMATION	POTENTIAL SOURCE	SUGGESTED METHODOLOGY	PRIORITY
Hotel occupancy by tourism hub and category	Hotels, operators, tourism authority	Audited monthly registry	High
Physical condition of tourism assets	Independent technical audits	Sample inspection and risk classification	High
Average expenditure per visitor	Exit surveys, banks, operators	Quarterly survey and payment reconciliation	High
Employment, real wages, and working conditions	Social security, inspection, surveys	Sector labor survey and observatory	High
Local procurement and productive linkages	Hotels, restaurants, suppliers	Procurement audit and input-output matrix	High
Carrying capacity in protected areas	Environmental authority, universities	Strategic environmental assessment	High
Impact of gentrification	Cadastre, municipalities, communities	Housing and price surveys	Medium
Water, energy, and waste footprint	Utility companies, hotels	Measurement per visitor/night	High
Inventory of foreign operators by hotel	Tourism authority, hotel chains, commercial registries, contracts	National registry of operators, brands, hotels, and contract terms	High
Hotel management, administration, and marketing contracts	State enterprises, foreign operators, administrative archives	Document collection, contract classification, and protected partial publication	High
Payments made by operators to employing entities	Operators, banks, employing entities, state accounting records	Accounting audit and payment reconciliation	High
Effective remuneration received by workers	Payrolls, testimonies, employment records, social security	Labor survey, document review, and claims mechanisms	High
Debts to suppliers and operators	Hotels, suppliers, banks, foreign operators	Financial audit and commercial reconciliation	High
Legal status of tourism assets	Property registries, historical archives, state enterprises	Property traceability and review of claims	High
Links between tourism assets and military or para-state entities	Business registries, contracts, beneficial ownership records	Beneficial ownership audit and economic-control mapping	High
Environmental condition of abandoned or closed hotels	Environmental authority, municipalities, technical audits	Rapid environmental assessment and risk classification	High

The research agenda should be implemented before committing to large-scale investments. In a transition scenario, the lack of data cannot be replaced by political intuition or investor pressure.

Conclusions

The comprehensive diagnosis of Cuba's tourism system leads to the conclusion that the sector's crisis is neither temporary nor reducible to the post-pandemic decline in international visitor arrivals. It is a structural crisis of competitiveness, governance, infrastructure, confidence, labor rights, and territorial sustainability. Cuban tourism still possesses assets of enormous value - cultural heritage, natural landscapes, coastline, biodiversity, historical identity, music, gastronomy, heritage cities, and human capital - but these assets remain underused or embedded in a model that does not adequately convert them into local well-being, decent employment, sustainable foreign-exchange earnings, or balanced territorial development.

Available evidence shows that Cuba is not facing merely a tourism-promotion problem. The country is not losing visitors because the world is unaware of its attractions, but because the tourism experience depends on material and institutional conditions that are currently severely weakened, including unstable energy supply, deterioration of basic services, air-connectivity constraints, supply shortages, poor quality in some services, payment restrictions, talent loss, limited statistical transparency, legal uncertainty for private and community actors, and a labor model that restricts worker autonomy. In this context, increasing international marketing campaigns without correcting structural problems could produce only marginal, costly, and unsustainable results.

A first central conclusion is that Cuban tourism must be rethought as a national and territorial system, not as a collection of hotels, beach resorts, or management contracts. Modern tourism competitiveness depends on networks: agricultural producers, sustainable fishers, transportation providers, guides, artists, food-service entrepreneurs, cooperatives, communities, local authorities, digital operators, trained workers, environmental institutions, health services, airports, roads, ports, telecommunications, energy, water, waste management, and legal certainty. If these links fail, a hotel may remain open, but the destination loses value.

A second conclusion is that the tourism development model based on centralized hotel expansion is insufficient and potentially risky if it is not accompanied by public information, economic assessment, environmental oversight, local participation, and labor guarantees. The construction or rehabilitation of tourism infrastructure makes sense only when it responds to real demand, operational capacity, connectivity, availability of water and energy, coastal protection, social returns, productive linkages, and respect for communities. Without these criteria, tourism investment can become an inefficient allocation of scarce resources, particularly in a country with urgent needs in food, energy, transportation, housing, health, and public services.

A third conclusion is that Cuban tourism should not be limited to the formal hotel sector. The greatest strategic opportunity lies in building a diversified portfolio that includes cultural, community-based, rural, gastronomic, scientific, educational, heritage, nature-based, wellness, nautical, diving, and small-scale tourism. This diversification should not be understood as a replacement for sun-and-beach tourism, but as an expansion of the value chain and territorial benefits. Beach tourism will remain relevant, but it should not absorb a disproportionate share of public investment, institutional attention, or available natural resources.

A fourth conclusion is that environmental and community-based tourism must be approached rigorously, not idealized. Cuba possesses important natural assets, including national parks, wetlands, biosphere reserves, coral reefs, rural landscapes, and protected areas. However, these spaces are fragile. Tourism expansion without carrying-capacity rules, environmental monitoring, visitor limits, waste management, discharge controls, species protection, mobility rules, and community participation could accelerate the degradation it claims to prevent. Nature-based tourism should therefore be designed according to the principle of "do no harm": first establish an environmental baseline, then implement controlled pilots, followed by independent evaluation, and only then scale up.

A fifth conclusion is that workers cannot be treated as a secondary operational component. They are at the core of tourism transformation. Destination quality depends directly on housekeepers, cooks, receptionists, maintenance technicians, guides, transportation workers, artists, divers, gardeners, cleaning personnel, food-service workers, entrepreneurs, heritage custodians, and host communities. Without decent wages, freedom of association, collective bargaining, independent labor inspection, certified training, occupational safety and health, and grievance mechanisms, Cuban tourism will not be able to sustain genuine improvements in quality or rebuild confidence.

At this point, the diagnosis requires recognition of a structural tension: Cuba has ratified fundamental International Labour Organization conventions, but the formal existence of international commitments does not in itself guarantee effective compliance. In the tourism sector, a democratic transition should thoroughly review the labor-intermediation regime, the relationship between foreign companies and Cuban workers, wage transparency, the possibility of direct employment, freedom of association, collective bargaining, and protection against retaliation. Tourism modernization cannot be built on labor precarity, suppression of trade union activity, or the political subordination of worker representation.

A sixth conclusion is that the historical participation of foreign hotel operators in Cuba must be specifically evaluated in any democratic transition. For years, these companies contributed brands, management, marketing, and market access, but operated within an institutional framework characterized by state labor intermediation, trade union restrictions, limited contractual transparency, and weak accountability. The recent departure of foreign chains not only confirms declining confidence in the destination, but also requires an examination of what labor, contractual, property, and environmental obligations remain unresolved.

A democratic transition should not begin from a presumption of automatic liability against every foreign company that operated in Cuba, but neither can it accept that formal compliance with legislation under the dictatorship excludes ethical, labor, or legal scrutiny. The standard should be due diligence: what each operator knew, what it could reasonably have known, what controls it applied, what it paid, to whom it paid, how much the worker received, what grievance mechanisms

existed, what relationship it had with state or military entities, what benefits it obtained, and what impacts it generated on workers, suppliers, communities, and tourism assets.

A seventh conclusion is that decentralization will be indispensable, but it must be gradual, regulated, and accompanied by institutional capacity. Municipalities and tourism territories should have greater decision-making authority over planning, licensing, local promotion, community participation, use of tourism revenues, impact control, and product design. However, transferring authority without resources, data, technical capacity, and anti-corruption mechanisms could reproduce at the local level the same problems of capture, opacity, and discretion. Tourism decentralization must therefore be accompanied by open data, verifiable budgets, citizen oversight, worker and community participation, and clear accountability rules.

An eighth conclusion is that tourism must contribute to the country's economic democratization. This means creating real opportunities for micro, small, and medium-sized enterprises, cooperatives, family businesses, community organizations, social-economy projects, professional associations, independent guides, cultural operators, rural producers, and local service providers. Opening the sector should not be designed exclusively for large investors or international chains. Foreign investment can play an important role in providing capital, technology, connectivity, and management standards, but it must be subject to rules on competition, contractual transparency, beneficial ownership, labor obligations, local procurement, clear taxation, and environmental responsibility.

A ninth conclusion is that Cuban tourism must abandon the logic of excessive territorial concentration. Havana, Varadero, and other traditional hubs will remain important, but a modern national strategy should promote territorial corridors connecting heritage, nature, rural areas, culture, gastronomy, research, education, and local enterprises. Territorial diversification can reduce pressure on saturated destinations, distribute income, create employment outside traditional hubs, and strengthen territorial cohesion. However, this strategy requires basic infrastructure, connectivity, safety, local training, and mechanisms to prevent residential displacement or gentrification.

A tenth conclusion is that statistical information is an enabling condition, not an accessory. Without reliable data on arrivals, expenditure, occupancy, employment, wages, asset condition, investment, profitability, energy consumption, water use, waste, environmental impact, local suppliers, visitor satisfaction, and the territorial distribution of benefits, tourism policy

remains trapped between propaganda, intuition, and discretionary decision-making. The first reform in a tourism transition should be transparency: public statistics, known methodologies, independent audits, updated registries, and periodic evaluation of results.

Outlook

From an economic perspective, tourism should be evaluated by its net contribution to national development, not solely by the number of visitors. A country may receive more tourists and still obtain limited benefits if average spending is low, occupancy is unstable, inputs are imported, wages are low, environmental impacts are high, and rents are concentrated. Priority indicators should therefore include retained local income, formal employment, labor productivity, domestic linkages, purchases from local suppliers, market diversification, expenditure per visitor, employment quality, environmental compliance, and climate resilience.

From an environmental perspective, tourism strategy must recognize that Cuba is highly vulnerable to hurricanes, coastal erosion, flooding, drought, saltwater intrusion, biodiversity loss, and deterioration of marine ecosystems. Coastal, nautical, and nature-based tourism must be integrated into

climate-adaptation policy. This means reviewing the location of investments, protecting mangroves, dunes, and reefs, avoiding construction in high-risk areas, promoting energy efficiency, managing water and waste, establishing adequate insurance, and designing business-continuity protocols for extreme events.

From an institutional perspective, the tourism transition must avoid both paralysis and disorderly liberalization. Paralysis would preserve current problems: centralization, opacity, limited competition, weak local participation, and restrictions on labor rights. But accelerated liberalization without rules could produce private concentration, real-estate speculation, labor deregulation, community displacement, corruption in concessions, and environmental degradation. The balance lies in a regulated, transparent, progressive, and evaluable opening.

Roadmap

The proposed roadmap should be understood as a logical sequence:

During the first twelve months, the priority should not be to sell a renewed image of the destination, but to build a reliable baseline: asset audits, open data, immediate labor protection, contract review, identification of environmental risks, and pilot design.

Between one and three years, enabling reforms should advance: proportionate licensing, destination management organizations, community and environmental pilots, workforce training, gradual direct employment, and financing mechanisms.

Between three and seven years, the country could scale successful projects, rehabilitate infrastructure, attract responsible investment, and consolidate productive linkages. Only over a seven- to fifteen-year horizon could Cuba realistically speak of a competitive, diversified, inclusive, and resilient tourism model.

Final Conclusion

The fundamental conclusion is that Cuba does not lack tourism potential; it lacks an institutional model capable of converting that potential into sustainable development, labor rights, and territorial well-being. Its assets exist, but they require democratic governance. Its human capital exists, but it requires freedom, training, decent remuneration, and participation. Its territories have value, but they require protection, infrastructure, and local decision-making. Its investment opportunities exist, but they require legal certainty, transparency, and competition. Its communities can participate, but they require rights, voice, and genuine mechanisms for sharing benefits.

The Observatory of Labor and Trade Union Rights must emphasize that tourism transformation cannot be separated from the democratic transformation of work. Modern tourism is not measured solely by available rooms, visitors received, or foreign exchange captured. It is also measured by the dignity of those who make it possible, the freedom of their labor organizations, the ability of communities to make decisions about their territories, the protection of ecosystems, and the transparency with which economic benefits are administered.

Accordingly, a national tourism transformation policy for Cuba should begin with five minimum commitments. First, full transparency of data, contracts, investments, and results. Second, effective guarantees of labor and trade union rights, including freedom of association and collective bargaining. Third, productive and territorial diversification with the participation of enterprises, cooperatives, and communities. Fourth, verifiable environmental sustainability, with carrying-capacity limits and independent monitoring. Fifth, democratic destination

The final conclusion is that tourism can be an engine of reconstruction, but only if it ceases to be conceived as an economic showcase and is instead treated as an integrated public policy. In a democratic transition scenario, the sector must serve citizens, workers, communities, and territorial sustainability. Recovering visitor numbers will be important, but the true measure of success will be different: whether tourism contributes to a Cuba that is more productive, freer, fairer, more transparent, and environmentally viable.

governance, with participation by workers, local authorities, the private sector, academia, communities, and civil society.

If these commitments are not met, the risk is that Cuban tourism will be rebuilt on the same foundations that explain part of its deterioration: concentration, opacity, low productivity, labor exclusion, territorial weakness, and environmental pressure. If they are met, tourism can become an important - though not exclusive - tool for income generation, institutional reconstruction, creation of decent employment, revival of local economies, preservation of heritage, and Cuba's integration into international circuits under more demanding democratic, labor, and environmental standards.

The legacy of foreign hotel operations must be addressed with institutional balance. A democratic transition cannot become an act of retaliation that destroys business continuity, deters responsible investment, or closes employment opportunities. Nor can it become an economic amnesty that ignores potential abuses, opacity, discrimination, improper labor intermediation, rent capture, or the use of assets of questionable origin. The proper path is truth, auditing, due process, remediation, and new rules.

Tourism reconstruction must provide legal certainty, but democratic legal certainty: one compatible with contractual transparency, beneficial ownership, freedom of association, direct employment, labor remediation, environmental protection, economic competition, and community participation. Only in this way will it be possible to attract responsible operators and prevent democratic tourism from reproducing the opaque, centralized, and labor-restrictive structure of the previous model.

Annex

Minimum Clauses for Future Hotel Operating Contracts in a Democratic Cuba

Every hotel management, administration, marketing, leasing, concession, or operating contract entered into in a democratic Cuba should include, at a minimum, the following clauses:

1. **Contractual Transparency Clause:** Obligation to publish essential information about the contract, including the parties, duration, principal obligations, consideration, incentives, grounds for termination, and oversight mechanisms.
2. **Beneficial Ownership Clause:** Obligation to identify the natural persons or structures that control or receive benefits from the operation.
3. **Direct Employment Clause:** Obligation to employ workers directly, except in justified cases involving specialized services, while avoiding abusive labor intermediation.
4. **Freedom of Association Clause:** Explicit recognition of workers' right to establish independent organizations, join them, bargain collectively, and act without retaliation.
5. **Traceable Wage Clause:** Obligation to document wages, tips, commissions, benefits, in-kind payments, and social-security contributions.
6. **Non-Discrimination Clause:** Prohibition of discrimination based on political opinions, trade union activity, race, sex, age, religion, territorial origin, family ties, or any other criterion contrary to fundamental rights.
7. **Occupational Safety and Health Clause:** Obligation to comply with sector-specific standards for kitchens, cleaning, maintenance, transportation, diving, swimming pools, chemicals, ergonomics, and psychosocial risks.
8. **Human Rights Due Diligence Clause:** Obligation to identify, prevent, mitigate, and address impacts on workers, communities, suppliers, and users.
9. **Anti-Corruption Clause:** Prohibition of improper payments, conflicts of interest, opaque contract awards, unjustified use of intermediaries, and concealment of beneficial owners.
10. **Environmental Clause:** Obligation to measure and reduce water and energy consumption, waste, discharges, emissions, and impacts on beaches, reefs, mangroves, wetlands, and heritage assets.
11. **Responsible Local Procurement Clause:** Obligation to promote linkages with local suppliers, cooperatives, rural producers, cultural enterprises, and community services.
12. **Training and Capacity Transfer Clause:** Obligation to train Cuban workers in languages, hotel management, sustainability, OSH, technology, customer service, and administration.
13. **Grievance Mechanism Clause:** Establishment of confidential, independent, and retaliation-free channels for workers, suppliers, communities, and users.
14. **Employment Continuity Clause:** Obligation to establish transition plans in cases of contract termination, change of operator, or closure of the establishment.
15. **Termination Clause for Serious Violations:** Authority to terminate the contract in cases of corruption, serious labor violations, trade union retaliation, environmental harm, concealment of beneficial ownership, or failure to comply with essential obligations.

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