

Venezuela's last act

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Like the Soviet Union in 1991, Chile in 1988, and East Germany in 1989, Venezuela's authoritarian façade may endure for months—but its collapse, when it comes, will be sudden and irreversible.

In the twilight of authoritarian regimes, stability often proves to be the most deceptive illusion. The Soviet Union still staged its parades as it approached dissolution. Communist Poland, even in 1988, rolled tanks down Warsaw's streets while the trade union Solidarity swelled inside the factories. Augusto Pinochet, supremely confident, submitted to a plebiscite he assumed was unwinnable—only to be stunned by defeat. Venezuela today inhabits precisely this paradox: the façade of a durable state masking the corrosion of its foundations.

Nicolás Maduro continues to play the role of head of state—attending summits, railing against imperialism, donning the sash of “commander in chief”. Yet behind the stagecraft, his grip on the instruments of coercion has all but vanished. The core of Venezuela's repressive apparatus, the military counterintelligence agency (DGCIM), no longer answers to him but to Diosdado Cabello, the true commissar of fear. Colonel Alexander Granko, notorious architect of torture, obeys not the generals above him but Cabello himself, who has transformed terror into a ministry of state.

The dynamic is best described as a division of labour: Maduro is the diplomatic façade, while Cabello holds the battlefield terrain. Like water, the president adapts, flows, and buys time. Cabello, by contrast, controls the “land”—the coercive institutions. Any attempt by Maduro to reclaim the centre would mean certain defeat. Likewise, Cabello cannot easily topple Maduro without provoking the full force of international sanctions. Both men are locked in a stalemate of necessity, bound by their mutual weakness.

But time is no longer on their side. On 28 July, Venezuela's armed forces voted overwhelmingly against Maduro. Once, complicity guaranteed officers privilege and protection. Now, association with a regime indicted for narcotics trafficking risks exposure to international courts. The cold calculus of costs and benefits is shifting: loyalty has diminishing returns; defection—especially under conditional amnesties—is increasingly attractive.

Here lies the crux. What was unthinkable five years ago—breaking with Maduro—has now become sensible, even necessary. The lexicon of Venezuelan politics has shifted: conditional amnesties for officers, once a heresy, are debated as pragmatic tools. DDR—disarmament, demobilisation and reintegration of paramilitaries—no longer a utopian fantasy, is being mooted

as policy. International pressure, from sanctions to naval deployments, accelerates this Overton shift. The horizon of possibility has moved.

Three scenarios loom. First, the status quo—militia rule and paramilitary coercion. This option is already fraying: the armed forces are disaffected, resources depleted, cocaine seizures in Amazonas belie the regime’s narrative of a “drug-free republic”. Second, the negotiated transition, which appears increasingly likely: the military pivoting towards a new equilibrium in exchange for institutional guarantees, externally verified. Third, the violent collapse—still possible if repression fails just as external pressure escalates, a prospect reminiscent of Central America in the 1980s.

History provides sobering lessons. In 1989, Poland’s Communist Party conceded to Solidarity because its secret police could no longer be relied upon. In Chile, Pinochet’s miscalculation at the plebiscite forced the army to prioritise institutional survival over personal loyalty. In East Germany, Erich Honecker ignored the accumulation of fissures—migration, protests, concessions—until the Berlin Wall fell. Venezuela today embodies all three conditions: a fatigued leadership, a coercive apparatus reliant on personal loyalty, a society that has ceased to applaud, and an international community exerting mounting pressure.

The pivotal actors are not Maduro and Cabello but the intermediaries: the armed forces, facing hunger, dwindling salaries and international scrutiny. Their rational choice points towards negotiation, not suicide. The wild card is the militia and colectivos: without a robust DDR programme, they could mutate into urban guerrillas, like El Salvador’s gangs after the civil war. This underscores the urgency of a binational framework—led by a post-Petro Colombia, the UN, and the European Union—to disarm and reintegrate them.

What, then, of Maduro? His options are few. He can cling to the militias, prolonging national suffering and risking violent collapse. He can acquiesce to negotiations, relegating himself to a decorative role in a transition he no longer controls. Or he can gamble on outright repression—an option that might accelerate his own downfall. None of these paths promises personal immunity: the indictment in New York will follow him, power or no power.

Here, two analytical traditions converge. Ancient strategists remind us that Maduro cannot retake the centre—coercion is already lost. Game theory shows that any such attempt circles back to the same dead end: retreat. For the armed forces, the rational strategy is clear—pivot towards a negotiated transition before the costs of resistance become unbearable.

Venezuela thus enters a moment of definition. The theatre of repression may continue for months, but not years. As in Warsaw, Santiago, and Berlin, the encirclement is silent, progressive, invisible—until the moment it becomes irreversible.

The curtain has not yet fallen on the Cartel of the Suns. The actors repeat their lines, but the applause has ceased, and the audience is already leaving the theatre. The question is not whether the play will end, but how: with one final outburst of violence, or with the negotiated transition that—more than ever—appears the most probable finale.