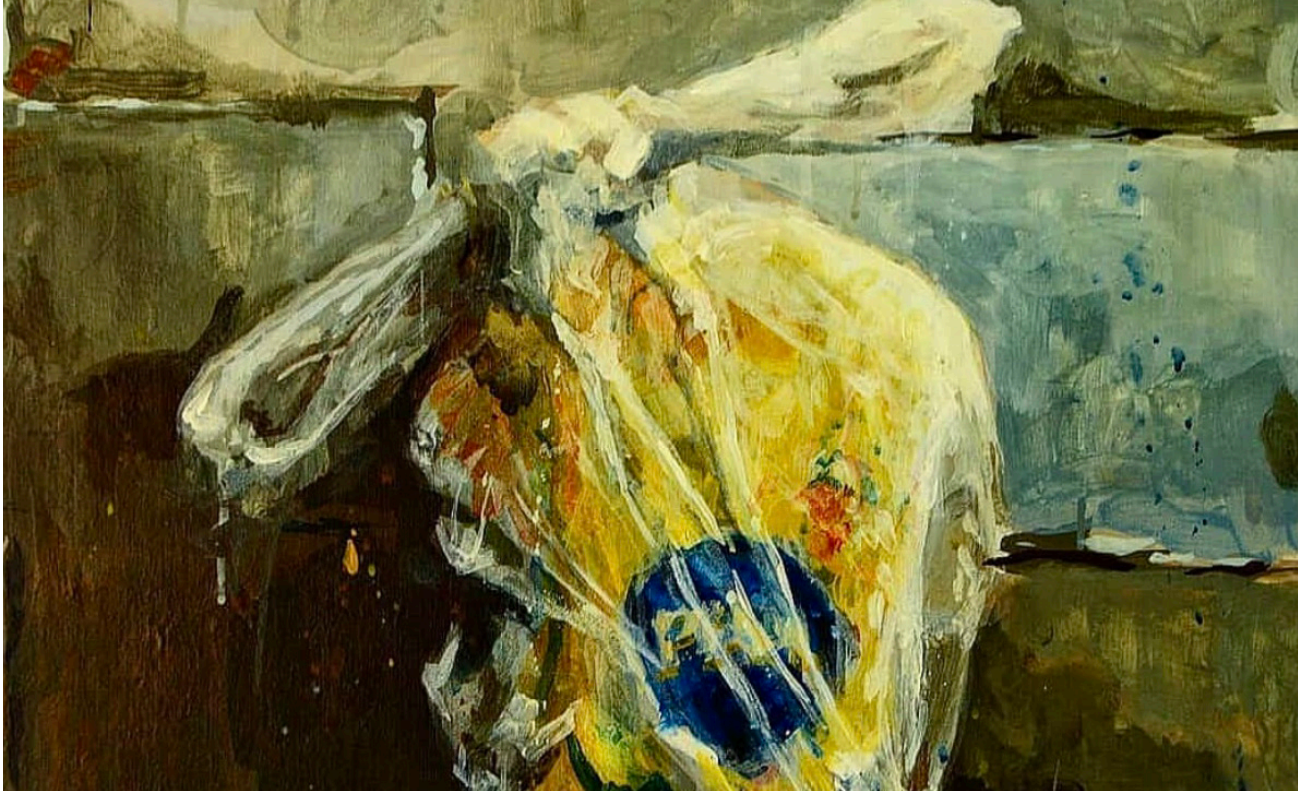

PENSAMIENTO PROPIO

PUBLICACIÓN TRILINGÜE DE CIENCIAS SOCIALES DE AMÉRICA LATINA Y EL CARIBE

Venezuela: de la promesa de una transición a la profundización autoritaria

Edición a cargo de Andrés Cañizález y María Isabel Puerta-Riera

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Sadio Garavini di Turno, Ingrid Jiménez, Jana Morgan, John Polga-Hecimovich, Andrés Ramos, Francisco J. Sánchez, Raúl A. Sánchez Urribarrí, David Sogge, Mariela Torrealba, Piero Trepiccione, Claudia Vargas Ribas e Ysabel Viloria

58

JULIO-DICIEMBRE 2023 / AÑO 28

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† In memoriam

Índice / Contents

Portada: Serie El Manda'o (2016),
de Rafael Arteaga.

Mensaje del Director

Venezuela: The Multidimensionality of a Hemispheric Crisis

More than five years ago, we published a special issue under this title in our magazine under the editorship of Thomas Legler, Andrei Serbin Pont, and Ornela Carelli-Ríos, in which the editors noted "the complex and multidimensional nature of the Venezuelan crisis" in the introduction. At that time, the Venezuelan crisis, with its regional and international repercussions, reached such a dramatic point that we preferred to replace this director's message with two blank pages "in homage to the Venezuelan people and in solidarity with the suffering they are going through."

Over these years, this suffering has deepened to unpredictable levels, and this complexity and multidimensionality have significantly intensified. Therefore, in publishing a number dedicated to Venezuela again, this time edited by María Isabel Puerta-Riera and Andrés Cañizales, and predominantly focused on some political and international aspects, we cannot fail to mention, even briefly at this juncture, the other dimensions of the crisis the country is going through. This time, the issue dedicated to Venezuela is published predominantly in English to facilitate the reading of articles and comments for an English-speaking audience.

The political crisis - in all its aspects and seriousness - is not disconnected from a profound economic crisis. The Venezuelan economy and the oil industry, which have been its economic backbone, have undergone a process of accelerated deterioration, only momentarily halted by stagnation and subsequent slight recovery since 2022, driven in the last year and earlier this year by the effect of the suspension of economic sanctions imposed by the United States as a pressure factor to promote a clean and transparent electoral process with opposition participation. The Maduro government's failure to comply with the conditions agreed upon in October of the previous year in Barbados

for this purpose has led to an increase in the illegal persecution of opposition members and repression of the media, alongside the use of various mechanisms to halt the progress of the opposition around the candidacy of María Corina Machado.

This process needs to be broken down into different aspects. On the one hand, the concern and interest of the United States in maintaining a flow of oil resources in the context of increasing international oil prices and, on the other hand, the need to stop Venezuelan migration to that country. This has led to a series of back-and-forths by Washington in the application of sanctions, also linked to a web of negotiations - some open, others covert - with Maduro, and limited authorization for Chevron to continue crude oil extraction in Venezuela - a key factor in the partial recovery of the industry and Venezuelan oil production in the last year but also for the United States' demand for oil - with an impact on the growth of the Venezuelan economy that has only begun to show in recent months, but where economic collapse persists with high inflation, high levels of debt, and marked income inequalities.

Moreover, Venezuela's humanitarian crisis - where 60% of the population lives in poverty according to data from a research institute (ENCOVI) at the Andrés Bello Catholic University (as there have been no official data on this matter for years) - has led to the emigration of more than 7 million Venezuelans in a country of 28 million, many of whom have attempted to reach mainly US territory, leading, in the context of ongoing negotiations, to an agreement for their repatriation by the United States. The humanitarian crisis, however, implies multidimensional poverty that includes marked income inequalities - according to some data, the inequality between the richest 10% and the poorest 10% is 35 times - but also access to services such as education and health, which, particularly in the latter case, has led to the collapse of the public health system, lacking supplies, doctors, and adequate infrastructure.

These data do not fully reflect the depth of the humanitarian crisis in which Venezuela is immersed, but they do reflect its articulation with the economic dimension and a political dimension that, in turn, are linked to high levels of corruption (as recently revealed in the case of PDVSA and the detention of its general manager closely linked to the government), misgovernment, and penetration by organized crime,

guerrillas operating in some areas, and drug trafficking, to the point that some analysts do not hesitate to describe it as a "mafia state," while citizens and civil society organizations suffer the "brutal and massive" onslaught of the regime with the approval of a Law of Supervision, Regularization, Action, and Financing of Non-Governmental Organizations and Related Entities that "would have devastating consequences for vulnerable populations affected by the humanitarian crisis, migration expulsion factors, and daily abuses of power," according to Amnesty International's director for the Americas. A law that would also reinforce the repression and persecution of political opponents and human rights activists.

Finally, as mentioned in the aforementioned previous special issue of Pensamiento Propio, the fading of the Chavista project at the continental level does not mean that the Venezuelan crisis does not have regional and hemispheric repercussions. Beyond the United States, some countries in the region have been affected by the migration crisis, and many governments - in a broad political spectrum ranging from Argentina to Brazil and Colombia - have demanded elections that do not involve the marginalization and persecution of the opposition and the violation of elementary citizen rights. In fact, the International Criminal Court is processing a complaint against the Maduro government for acts of crimes against humanity. On the other hand, a geopolitical dimension to consider is the alignment of the current Venezuelan government with Russia and its connection with China, to which is added the crisis in the Essequibo as the government seeks to turn it into a call for national unity within an evident maneuver aimed at diverting the country's attention from the elections, after a long period of mishandling of the claim.

In this context is the turbulent electoral process that should culminate on July 28 of this year but is unlikely to displace the Maduro regime, even if the opposition achieves a decisive victory and it is recognized. The dismantling of the criminal network that supports it will, in any case, pose a significant challenge for any government that takes office and does not identify with Chavismo.

Against this background, the articles included in this edition of the magazine, both in the **Analysis and Research** section and in the **Comments** section, analyze and highlight various aspects of the political and international dimension of the Venezuelan crisis and serve as an important reference for a comprehensive understanding of it. Both sections have been organized and evaluated by the editors, with the exception of the commentary on the Essequibo written especially for the magazine by the former Venezuelan ambassador to Guyana, Sadio Garavini. We therefore appreciate both the meticulous work of the editors, the contribution of Ambassador Garavini and the authors who have collaborated with research and analysis articles, and comments, as well as the reviewers who have contributed to this issue.

Until the next issue.

Andrés Serbin

Introducción

In the challenging landscape of democratic resilience, 2019 will be remembered as a failed opportunity for Venezuela in its struggle for a transition. The negotiated solution to the crisis brokered by the Norwegian government was at a stalemate, leaving room for other approaches to pressure Nicolás Maduro. The Trump administration-imposed oil sanctions on the state-owned company PdVSA. A measure welcomed as strong support for the newly constituted Interim Government led by Juan Guaidó, unleashing a series of moves in the region intended to pressure Nicolás Maduro to agree on an electoral solution to the crisis.

Amid a profound humanitarian catastrophe worsened by the SARS-CoV-2 pandemic, the *maximum pressure* policy adopted by the White House, with its ambiguous promise that *all options were on the table*, became a heavy burden for the Opposition. The Interim Government, hamstrung by outsourcing its duty to represent Venezuelans, became dependent on foreign governments to fulfill their representation duties. What was seen as an opportunity for a breakthrough turned out to be another source of frustration in a country suffering a wide-ranging humanitarian catastrophe. The much-expected cracks in the Maduro coalition never came to fruition, instead, it was the Interim Government and the coalition that supported it that started to show signs of exhaustion, given the lack of success of the strategy.

The consequences of the failed strategy can be measured not only in the Opposition's further fragmentation but also in the more than 7 million Venezuelan migrants that have flooded the region from neighboring countries all the way up to the Southern Border, triggering a crisis that has required more engagement from those governments incapable of managing increasing numbers of desperate immigrants. On the other side, the Maduro government has tirelessly claimed the situation results from the economic sanctions imposed by the United

States, demanding its relief. Initially, this was their motivation to accept joining the conversations brokered by the Norwegian government, although without committing to guaranteeing electoral conditions for a peaceful resolution of the political crisis. However, the conditions set by the new Biden administration did not diverge completely from the previous administration, leaving the Maduro government with few options to push for lifting the sanctions.

Then Russia invaded Ukraine, and the geopolitical map changed, opening opportunities for a different approach to the Venezuelan crisis, especially in light of the growing influence of Russia and China, as Venezuela turned to these illiberal powers for support after the U. S. isolation punishment. The backlash the Biden administration received after signaling an interest in easing sanctions in exchange for electoral conditions had domestic and international repercussions. It was seen as a weakness and motivated solely by an interest in securing the oil supply during the war. Nevertheless, this was not immediate, given the distrust between the Opposition and the Maduro government that also extended to the U. S. government.

As we close this special issue, "*Venezuela at a Juncture*," the country finds itself at another crossroads in its multidimensional crisis. A breakthrough for the Opposition and the Maduro government with an agreement to restart negotiations that include guarantees for the Opposition to participate in free and fair elections has renewed hopes for a peaceful solution to the crisis. However, the commitment between the two sides has a long road ahead, given the need to specify the conditions outlined in the October 2023 Barbados meeting. The lack of clarity on the operationalization of the agreement has led to skepticism among the Opposition, especially given the track record of the Maduro government in following through these accords in previous instances.

This special issue builds upon the notion of a *critical juncture*[1], where both political actors face a defining moment to shape the country's future for the coming years. In this spirit, we have gathered seven perspectives on how Venezuela reached this point in an effort to characterize the stages in the evolution of democratic erosion. A first and timely contribution is provided through the debate on authoritarian consolidation in ***Political Survival and… Authoritarian Consolidation? The Maduro Government and Venezuela's Political Crisis*** by John

Polga-Hecimovich and Raúl Sánchez Urribarrí. The authors analyze the correlation between crisis survival and consolidation. They provide a multi-dimensional conceptual framework to assess the intricated process of authoritarian consolidation that explains how the regime has neutralized internal threats while deepening its hold on power.

In another perspective, we find the authoritarian nature of the Venezuelan regime approached through the lenses of deinstitutionalization, extreme polarization, and democratic erosion. In ***Party System Collapse and Democratic Decay in Venezuela: From Ideological Convergence to Institutional Polarization***, Jana Morgan claims that the deterioration of Venezuelan democracy became an indicator of the democratic decay in the region. The author argues that the origins of democratic erosion in the country can be traced back to the crisis of representation in the 1990s that led to the breakdown of the party system, paving the way to the rise of Hugo Chávez and the institutional polarization that has contributed to the democratic decay.

One of the key elements in the democratic backsliding of Venezuela can be found in the warning signs many recognized as anti-democratic sentiments taking shape in Venezuela. The emergence of an outsider, Hugo Chávez, was neither an accident nor inevitable. In ***"Chávez Did Not Come from Mars": An Overview of De-democratization Processes in Venezuela from a Multi-Faceted Perspective*** Andrés Cañizález and Andrés Ramos delve into the support of an anti-establishment candidate with the backdrop of a de-democratization process. A broad theoretical discussion to provide context for the depth of the deconstruction of democracy in Venezuela.

The events that preceded the election of Hugo Chávez laid the ground for an institutional takeover that included a new constitution, in what ***Venezuela: Times of Depolarization*** by Ingrid Jiménez and Piero Trepiccione consider deepened the political divides, with the media amplifying these tensions. The failure to establish a socialist state exacerbated the polarizing environment, continuing the political and economic crisis. The authors argue that exhaustion and distrust in political elites have moved Venezuelans towards a more pragmatic approach to ideology.

A critical factor in democratic resilience is the existence of a free press. The continued attacks against and censorship of the Venezuelan media are well within the experiences of other authoritarian regimes in Latin America. In ***Disinformation in Venezuela: Media Ecosystem and Government Controls***, Mariela Torrealba and Ysabel Viloria present a broad review of the decline in freedom of information in the country, especially with the serious limitations in the media ecosystem. The initiatives fostering disinformation through the emergent social media platforms while the government controls information by suppressing independent media and dissident voices create the conditions for information gaps that prevent Venezuelans from exercising their right to be informed.

Another consequence of democratic erosion can be found in the regional context. In ***The roller coaster of disruptions and Rapprochements between Venezuela and Colombia: A brief prospective reflection,*** Francisco Sánchez argues that in a spillover crisis, the tensions between Colombia and Venezuela turned sour a historical bilateral relationship. The disruption in 2019 continued until 2022 when the ideological alignment with the newly elected left-leaning Gustavo Petro opened the door for a reset between the neighboring countries. The disagreements between Chávez and Maduro with previous right-leaning Colombian presidents significantly impacted border dynamics, with bilateral trade suffering a steep decline. The crisis worsened due to the increasing migration influx through the Colombia-Venezuela border, making the case for a strong diplomatic relationship focused on democracy, human rights, and sovereignty for a lasting and harmonious relationship.

Finally, we close this special issue on Venezuela with a crucial topic: ***Back to the Andean Community: A Temporary Solution towards the Migratory Regularization of Venezuelans?*** by Claudia Vargas Ribas. The Andean Community (CAN) gathers Bolivia, Colombia, Ecuador, and Peru. Venezuela effectively withdrew from it in 2011 after Hugo Chávez made the announcement in 2006. The Venezuelan exodus in the region has faced challenges, given the limitations from countries like Peru and Ecuador that have implemented visa requirements, creating an opportunity for mistreatment and discrimination against Venezuelan migrants. The author argues that based on data about the inconsistencies in regularization processes, the reintegration

of Venezuela into the CAN could be an opportunity for economic benefits, providing a framework for the rights of Venezuelan migrants, although stressing that a long-term solution continues to be the resolution of the country's crisis and re-democratization.

This special issue aims to provide context for an English-speaking audience on the conditions that brought *chavismo* into the Venezuelan political landscape and allowed its advance into an authoritarian model that seems to have strengthened after a series of failed attempts at reigning it. In this sense, our goal was to provide a thorough profile of the Venezuelan socio-political crisis, describing the rise and consolidation of *chavismo*, and the political processes that have unsuccessfully attempted to promote a transition with the help of the international community and the Latin American region. This is an academic contribution to the debate amid extremely uncertain circumstances for Venezuela, in a defining juncture that could probably determine the future of millions of Venezuelans at home and abroad.

María Isabel Puerta R.

NOTES

1. "A critical juncture is (1) a concentrated, macro episode of innovation that (2) generates an enduring legacy." Collier, D., & Munck, G. L. (2022). In Critical junctures and historical legacies: Insights and methods for comparative social science (pp. 33–52). chapter, Rowman & Littlefield.

Political Survival and… Authoritarian Consolidation? The Maduro Government and Venezuela's Political Crisis

John Polga-Hecimovich
Raúl Sánchez Urribarrí[1]

In the ten years between the election of President Nicolás Maduro in 2013 and 2023, Venezuela experienced a protracted, sustained deterioration of its regime from a hybrid regime towards autocracy. This autocratization was accompanied by hyperinflation, economic contraction, food scarcity, and a social and humanitarian crisis that led over seven million Venezuelans to migrate – over a fifth of the country's population. Maduro experienced an ongoing confrontation with his emboldened opponents, especially after the opposition's success in the legislative elections of 2015. However, the Maduro regime managed to block a presidential recall referendum (2016); created, organized, and established a pro-regime Constituent Assembly to subvert existing political authorities (2017); and manipulated subnational (2017) and then presidential elections (2018) to deepen its power. All of this, whilst

stifling the opposition's legislative efforts, relying on a regime-friendly Supreme Tribunal packed with pro-government judges, and relying on the military establishment for cover.

Thus, the regime successfully thwarted subsequent opposition efforts to remove Maduro and reinstate democracy, despite the opposition's refusal to acknowledge Maduro's 2018 reelection and their appointment of Juan Guaidó, President of the National Assembly, as interim president in January 2019. This move was supported by dozens of countries including the United States, most Western powers, and various Latin American nations, which recognized Guaidó as interim president. The US and its allies imposed economic sanctions on the regime to apply pressure and encourage a breakdown of the regime coalition. Despite these efforts, Maduro maintained his grip on power, moving the country's governance toward increasingly authoritarian methods amid subsequent protests and incidents. As a result, Nicolás Maduro appears to have solidified his hold on power in post-pandemic Venezuela, making the prospect of restoring democracy highly unlikely.

This paper aims to investigate the extent to which Maduro has consolidated a fully-fledged authoritarian regime and in what ways. Has he simply maintained his position as president, solidified his power, become more authoritarian, or pursued alternative approaches? Several scholars have examined Maduro's ability to survive amidst crisis and international policies aimed at his removal. They have noted the regime's increasing authoritarianism (Corrales, 2020; Salmerón & Salmerón, 2019; Corrales, 2023; Romero, 2020; Bull & Rosales, 2020; Penfold, 2023). However, can we confidently state that Venezuela under Nicolás Maduro has become a fully consolidated autocracy? What aspects of autocracy are consolidated, and what are the implications?

The answer to these questions depends on how we define authoritarian consolidation—a concept where, surprisingly, there has been limited scholarly work to date and a lack of consensus prevails. As we explain below, regime consolidation is a widely discussed concept in the context of *democratic* consolidation, but not so much with regards to *authoritarian* consolidation. Studies that do exist tend to focus on authoritarian consolidation in specific cases, including those of Russia, Nicaragua, several ex-Soviet republics, Turkey, Rwanda, and Middle East and North Africa (MENA) states (Lankina, 2009; Gel'man, 2015;

Stuenkel, 2021; Ambrosio, 2014; Bedford, 2017; Akçay, 2021; Rafti, 2008; Badran & Turnbull). However, scholars who have considered the issue of Nicolás Maduro's government survival in Venezuela have not specifically addressed the issue of whether, and to what degree, the regime has consolidated (Rosales & Jiménez, 2021).

Thus, this article contributes to the study of Venezuela's political regime under Maduro and, more importantly, to the broader question of authoritarian consolidation in comparative perspective. We grapple with the definition of authoritarian consolidation and its complexities, arguing for a multi-dimensional concept as the optimal approach to capture the different logic and dynamics involving regime consolidation. Moreover, we initiate a conversation about the challenges of measuring this concept, with the intention of analyzing the intricacies of the Venezuelan case. We approach Venezuela under Maduro as an authoritarian polity, where different levels and configurations of consolidation have taken place at different points in time and in different respects, in the context of (unsuccessful) threats to the regime's survival. Moreover, we unpack the relationship between crisis survival and consolidation, two related but distinctive processes.

This research is structured as follows: After an introductory section, we delve into the democratic erosion and autocratization paths that Venezuela underwent since 1999, with special attention given to the Nicolás Maduro era (2013-present). The section below synthesizes prior studies on regime consolidation, with attention to the extensive literature on democratic consolidation prior to exploring the developing field of authoritarian consolidation. Furthermore, we draw from this literature to present our own multidimensional conceptualization of authoritarian consolidation, which examines various aspects of the regime's institutional landscape, as well as its domestic and international relations, and state-society relations in an autocratic environment. Subsequently, we analyze the process of authoritarian consolidation in Venezuela during the Maduro regime. We introduce various areas of relevance to better understand the phenomenon of authoritarian consolidation over time. The final section provides insights into potential questions and concepts for future studies on authoritarian consolidation, specifically in the Venezuelan context.

Venezuela's Regime under Nicolás Maduro: Democratic Erosion and Autocratic Rule

Many scholars and political analysts contend that Venezuela has undergone democratic erosion and gradually turned authoritarian since Hugo Chávez assumed the presidency in 1999. While there is general consensus in the literature regarding the overall path and major phases involved, which encompasses a crisis democracy, a hybrid regime, a competitive authoritarian regime, and finally, an overtly autocratic polity, there are notable differences of opinion concerning the exact characteristics of these phases or regime types, the precise moments when transitions from one form of governance to another occurred, and the defining features they embodied, among other specific details.

Scholars of Venezuelan politics have long been divided on the democratic nature of the regime, and little consensus exists, even among those who agree on the democratic erosion argument. However, there is little doubt that both electoral democracy and liberal democracy have decreased in Venezuela since 1999. Figure 1 from the Varieties of Democracy project illustrates this, showing Venezuela's transition from a flawed democracy to a hybrid regime and ultimately to authoritarianism. Despite the nature of the regime trajectory, other features of the regime, such as their stability, potential for change, and the level of consolidation, also spark significant disagreements (Benigno, 2016). This process unfolded over a period of 25 years amidst a tumultuous political history riddled with multiple critical junctures. In the upcoming sections, a succinct overview of this procedure will be presented, outlining significant steps utilized in subsequent analyses.

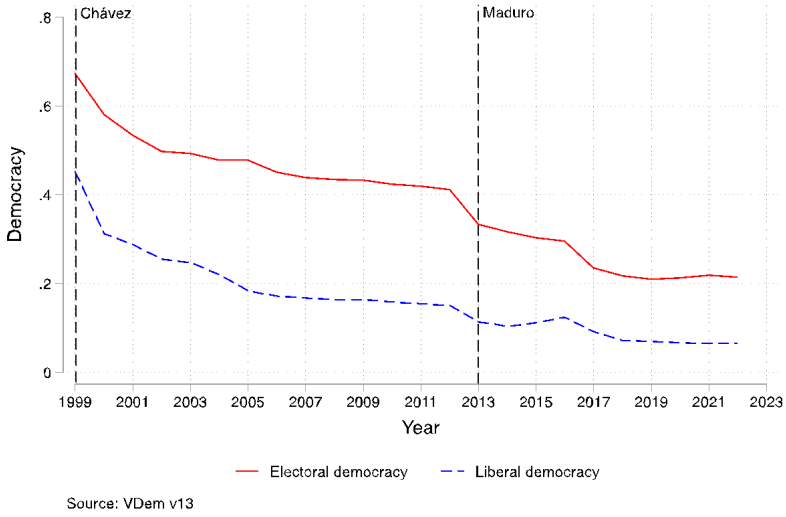

Figure 1. The Evolution of Venezuelan Democracy (1999-2023)

Democratic Erosion under Chávez (1999-2013)

Following a decade of turmoil, Hugo Chávez's electoral victory in 1998 marked the termination of a prolonged era of representative democracy in Venezuela, and instigated a new epoch in Venezuelan politics (Ellner, 2008; McCoy & Myers, 2004). Chávez's political vision encompassed a blend of socialism, populism, nationalism, and Pan-American *Bolivarianismo*. Widely popular and with majority support in the country's National Assembly, Chávez adopted a majoritarian-style, plebiscitary interpretation of democracy that largely ignored the views and values of the political opposition. He relied on a polarized discourse that blamed the opposition and key elite groups for the country's crisis, and proceeded to change and subsequently dismantle Venezuela's democratic institutions.

In 1999, the changes began with a constitutional reform via a constituent assembly. Chavez embarked on a major institutional reform exercise, dismantling the country's key democratic institutions and practices based on a permissive interpretation of constituent power theory (García S., et al., 2008). Politically, Hugo Chávez concentrated power and removed checks on his socialist agenda by installing loyalists

in the courts and military, integrating the armed forces into politics, and dismantling independent media. Additionally, he exerted control over other public institutions by appointing supporters to the Supreme Court, Electoral Council, and other independent authorities. After a period of political turmoil involving a failed coup in April 2002 and a significant strike later that year, Chávez successfully withstood a contentious recall referendum in 2004 and subsequently increased his authority in the legislative elections of 2005. He then implemented a "21st Century socialist" plan meant to reshape Venezuela's principal political institutions into a socialist state. Faced with rising opposition and economic stagnation, the Chávez regime gradually became more autocratic. Consequently, at the time of his death in 2013, Venezuela was no longer a liberal democracy nor a dictatorship, but rather a hybrid regime in which the political playing field was heavily skewed in favor of the governing United Socialist Party of Venezuela (Partido Socialista Unido de Venezuela, PSUV) (Mainwaring, 2012; Alarcón, *et al*, 2016).

Chávez's leadership figure, his time in power, the changes he wrought, and his polarizing legacy have all been the focus of extensive scholarly work in the social sciences (Ellner, 2008; Corrales & Penfold, 2011). Yet Venezuela's collapse has continued unabated under his anointed successor, Nicolás Maduro, descending from a hybrid regime into authoritarianism with restricted civil liberties, fraudulent elections, and widespread repression of political opposition (Polga-Hecimovich, *et al*., 2017; Corrales, 2023; Pantoulas & McCoy, 2019). This latter process needs further consideration as a distinct phase – one in which Chavismo's democratic erosion continues, but where special attention also needs to be paid to the development of autocracy-building and the establishment of authoritarian logics and practices as the backbone of the regime.

Nicolás Maduro's Embrace of Autocracy

How exactly did this process of democratic erosion and autocratic consolidation unfold under Maduro? Why was it a distinct phase from the previous one under Chávez? And what are the key areas to observe to make sense of the process of autocratic consolidation that has taken place under his rule? There are three interrelated keys to understand

the need for enhancing authoritarian control at the expense of democratic institutions: The collapse of the Venezuelan economy, the domestic/external opposition's increasing influence against Maduro, and the instability of Maduro's own coalition with the wide range of actors that coexist within Maduro's regime. There are more factors to assess, but these are essential factors linked to the process of survival and consolidation of Venezuela's regime (and political regimes more generally).

The varying degrees of influence of each factor throughout the regime and their respective roles in the downfall of Venezuelan democracy are subject to debate. Maduro's inability to effectively respond and preserve his ruling against the multidimensional threat within a competitive authoritarian regime at the time, explains the collapse of Venezuela's remaining arenas for democratic contestation. This emphasizes the need for further safeguarding and managing his rule through the formalization and routinization of autocratic practices. The architecture of this authoritarian regime has its roots in the process of democratic deterioration that occurred before, but also reflects new and distinctive ideas and initiatives.

The first important factor to note is Maduro's lack of popular support in comparison to his predecessor. With less charisma than Chávez and facing a troubled economy, Maduro's ten-year tenure has been rife with turmoil, and social mobilization against his rule has been ongoing. Since taking power in 2013, Maduro has faced significant opposition in the form of massive street protests occurring in February 2014, September 2016, April 2017, and January 2019. However, these demonstrations did not significantly persuade Maduro to enter into negotiations. Rather, the Maduro regime responded with increasingly intolerant and repressive measures. He utilized the state security apparatus against the populace in what a July 2019 report from the United Nations' human rights commission confirmed was a tactic "aimed at neutralizing, repressing, and criminalizing political opponents and those critical of the government" (UNHCHR, 2019). This not only entailed a strategy of criminalizing certain opponents, but also establishing an environment that normalized political abuse against protesters. As a result, the likelihood of facing punishment, physical violence, and even death became common and unpredictable.

The opposition's growing influence resulted in a significant win during the 2015 legislative elections, securing control of at least two-thirds of Parliament. Nonetheless, with the aid of a newly-staffed Supreme Court, the Maduro administration voided the National Assembly, which was under the opposition's command (Sánchez U., 2016; Sánchez U., 2022). The judiciary, long under regime control, aided in eroding the hybrid regime's remaining democratic features and either ignored or supported the regime's adoption of autocratic measures (Brewer-Carias, 2021). Thus, in response to domestic opposition in 2016, the government delayed regional elections and halted an opposition-initiated recall referendum against Maduro. Additionally, military officials were more extensively integrated into national leadership roles and the detention of political dissidents was heightened (Alarcón *et al*., 2016). Next, in March 2017, Venezuela's Supreme Court of Justice (Tribunal Supremo de Justicia, TSJ) announced its intention to take on the parliamentary functions of the opposition-controlled National Assembly. However, internal regime pressure ultimately caused the TSJ to retract this decision. By that time, the Supreme Tribunal, which was reliably pro-government, had effectively hindered the Assembly's constitutional prerogatives. It had decided dozens of cases against the legislature, which was a remarkable instance of "authoritarian judicial activism" (Sánchez U., 2024).

Following ongoing protests, in 2017, the president called for drafting a new constitution under a handpicked, non-democratic National Constituent Assembly (ANC). Ostensibly, this was to re-write the country's 1999 Political Constitution, but in reality, it sought to create a pro-government legislative body to supersede the opposition-controlled National Assembly (Boersner, 2020). On July 30, 2017, the government carried out elections for representatives to a National Constituent Assembly (ANC) which were widely considered fraudulent. The government claimed a turnout of 8.5 million people, while opposition, independent analysts, and the company that built and managed the electronic voting machines (Smartmatic) estimated a participation of 2.2-3.6 million. It is likely that the government also perpetrated fraud in the long-delayed gubernatorial elections that finally took place on October 15, 2017, and especially in the presidential elections that were held in May 2018. These events were denounced in Venezuela and abroad as lacking electoral integrity, and as pivotal steps for Maduro to

retain power in a context of crisis. Meanwhile, the country's economy continued to falter, with ongoing hyperinflation and a scarcity crisis that showed no signs of improvement.

Blocked from using legislative prerogatives and appealing to constitutional channels to remove Maduro, the opposition deployed a comprehensive strategy to delegitimize and replace the Maduro administration. In an effort to unseat Maduro, the National Assembly appointed Juan Guaidó as the country's interim leader in January 2019. More than 50 governments, including the United States, Canada, and most of South America, recognized Guaidó as the legitimate president of the country. This sparked a prolonged struggle for power amidst a time when loyalties to the regime were being questioned (with many politicians and high-profile officials speaking out against the regime). Nevertheless, Maduro managed to remain in power through repressive tactics, with the backing of a group of influential civilian allies and high-ranking military personnel. A rebellion on April 30, 2019 and a maritime infiltration in 2020 by Venezuelan dissidents and American mercenaries called Operación Gedeón or *Macutazo* ("Coup from Macuto") fizzled. These incidents resulted in widespread prosecution and increasingly violent measures to thwart any future attempts against the regime.

In the following years, Maduro continued to adopt authoritarian practices to retain power, relying on his control of the state apparatus as described above, and counting with the support of several authoritarian allies in the region and globally. He resisted international economic sanctions, continued unabated despite the catastrophic shrinking of Venezuela's GDP, and defied an ensuing humanitarian crisis that ended up forcing over millions of Venezuelans to leave their country (Rosales & Jiménez, 2021). Moreover, it was able to withstand the open rejection and denunciation of dozens of governments and political authorities, including the U.S. and the European Union, which refused to recognize Maduro as legitimate ruler and sided with Juan Guaidó. As of today, only a handful of governments fail to recognize Maduro as president – both Maduro's departure and re-democratization appear unlikely. Rather, the country seems to be on the path to autocratic stability (Aveledo, 2023; Corrales, 2023).

Will the authoritarian features of the Maduro regime continue to persist? To what extent are these characteristics and developments crucial for the regime's continued existence? It is necessary to differentiate between the regime's "crisis" in terms of the stability of its coalition, its ability to govern, and its legitimacy and support on one hand, and the emergence of new institutions and practices of an authoritarian nature on the other. Some of these characteristics seem more durable, consistent, and widely accepted than others, likely due to their reliance on past authoritarian practices or a lack of significant opposition to their establishment and enforcement. In contrast, certain traits appear less enduring. For example, the Maduro regime seems to utilize less overt political repression and violence to maintain its control (although violations of human rights persist).

As previously explained, Venezuela serves as an example of a "slow motion coup" in which a previously consolidated democracy slowly eroded into a hybrid regime and authoritarianism. This process was driven, in part, by the deliberate decisions of the ruling elite (Polga-Hecimovich et al., 2017). As a result, the regime transitioned from competitive authoritarianism to "hegemonic authoritarianism" (Alfaro, 2020; Arellano, 2023). The stability of this new phase remains to be seen. To what extent do the regime's main political actors support Maduro's authoritarian regime without significant opposition? In other words, how consolidated is the regime?

Conceptualizations of Consolidation

Whether or not the recent Venezuelan experience constitutes consolidation of authoritarianism depends on how the term is defined and operationalized. For example, McCarthy argues that Maduro consolidated preexisting authoritarian institutional and corporatist elements of Hugo Chávez's time in power *prior* to 2019 in an attempt to placate ruling elites (McCarthy, 2022). Meanwhile, Rosales and Jiménez contend that Venezuela experienced a process of authoritarian consolidation after 2019, maintaining that it was the result of the ruling elite successfully retaining power (Rosales & Jiménez, 2021). By contrast, Gandhi and Sumner's item response model (2020), which measures the consolidation of power rather than regime, suggests that

neither Chávez nor Maduro consolidated their individual rule as such. In what follows, we sum up key lessons from the existing scholarship on regime consolidation, including both democratic and authoritarian consolidation. As we will see, the former is much more developed than the latter, highlighting the need for additional research on autocratic consolidation in comparative perspective.

Democratic Consolidation

The absence of a consensus in describing Venezuela's regime status in recent decades highlights the conceptual confusion surrounding the concept of regime consolidation, and its misuse in the Venezuelan context. Scholars have engaged in a prolonged discussion on the meaning of regime consolidation, with various conceptualizations being introduced (Schmitter & Santiso, 1998; O'Donnell, 1996; Valenzuela, 1992). Reflecting on the lack of consensus regarding the term, Schedler identified the numerous attributes associated with "democratic consolidation" - with the literature primarily focusing on democracy - and stated that the concept had been constructed on "quicksand of semantic ambiguity" (Schedler, 2001). Thus, "consolidation" meets the criteria of an "essentially contested concept" (Gallie, 1956).

One key debate centers around whether "consolidation" should be viewed as a threshold to be achieved (i.e., the regime is deemed "consolidated") or as a process (i.e., the regime is currently undergoing or on a path towards consolidation). For those who conceive of consolidation in terms of a threshold, it is commonly thought of as the point at which a nation's regime is relatively secure from a political reversal, whatever "relatively secure" may mean. For instance, according to Samuel P. Huntington's "two-turnover test" (1991), democratic consolidation is achieved when the winning party of the initial election is defeated and peacefully hands over power to the subsequent winning party, which in turn also peacefully relinquishes power to the winners of a later election. The initial transfer of power through an election signifies the ability of voters to remove a leader and opposition parties to assume control of governance. The subsequent handover serves to exhibit the acceptance of democracy as a means of changing leaders rather than entire regimes, by society as well as the elite class alike.

Consequently, this type of approach regards non-reversal of regime type as evidence of consolidation.

Alternatively, for those who see it as a process, consolidation consists of transformation of the arrangements, norms, and contingent solutions of regime transitions into enduring structures with relationships that are reliably known, regularly practiced, and habitually accepted (Schmitter, 1995). This can involve legitimization of these arrangements and norms on several different levels, such as amongst parties, interest groups, and civil society. Democratic consolidation, then, would involve strengthening and solidifying democratic institutions, norms, and practices to ensure that democratic principles become deeply ingrained in a nation's political culture. Depending on the definition of democracy ones adopt, this could include a wide scope of institutions and practices. In a liberal-democratic perspective, though, democratic consolidation would usually involve holding free and fair elections—a minimum standard of democracy, according to most definitions—but also establishing strong rule of law, protecting human rights, promoting civil liberties, fostering a vibrant civil society, ensuring media freedom, and creating an independent judiciary (Diamond, 1999). Under this framework, regime persistence or survival over (a certain amount of) time are seen as evidence of consolidation (Schmitter & Santiso, 1998; O'Donnell, 1996).

Some approaches incorporate both aspects of this division. Linz and Stepan famously defined "democratic consolidation" as a political regime where democracy, consisting of a complex set of institutions, rules, incentives, and disincentives, becomes the only viable option (Linz & Stepan, 1996). This definition presupposes that reaching the democratic threshold necessitates a transformational process that ultimately leads to a state where no other regime alternatives or prospects are available to some extent. Of course, there appears to be a tautology in nearly all definitions of consolidation, whether conceptualized as a threshold or a process: the absence of breakdown or reversal is viewed as evidence of consolidation, while their presence signals non-consolidation. This outcome-based explanation impedes researchers from detecting different levels of consolidation during periods of persistence, thereby limiting its usefulness.

Authoritarian consolidation

There is a similar lack of consensus regarding the meaning of authoritarian consolidation. What is more, comparatively, there is much less written about authoritarian consolidation than democratic consolidation, and the concept is also far less developed in the academic literature that its democratic counterpart. While scholars flocked to explain the survival and entrenchment of democracy across the globe in the 1990s and 2000s, autocratization in the 2010s and 2020s has not necessarily occurred on the same scale. Instead, the third wave of autocratization has been marked more by backsliding into hybridism than outright authoritarianism (Bermeo, 2016).

Figure 2 visually illustrates this discrepancy. It builds a Google *n*-gram, which charts the frequencies of search terms in printed material, to plot the evolution of the phrases "democratic consolidation", "authoritarian consolidation", and "power consolidation".

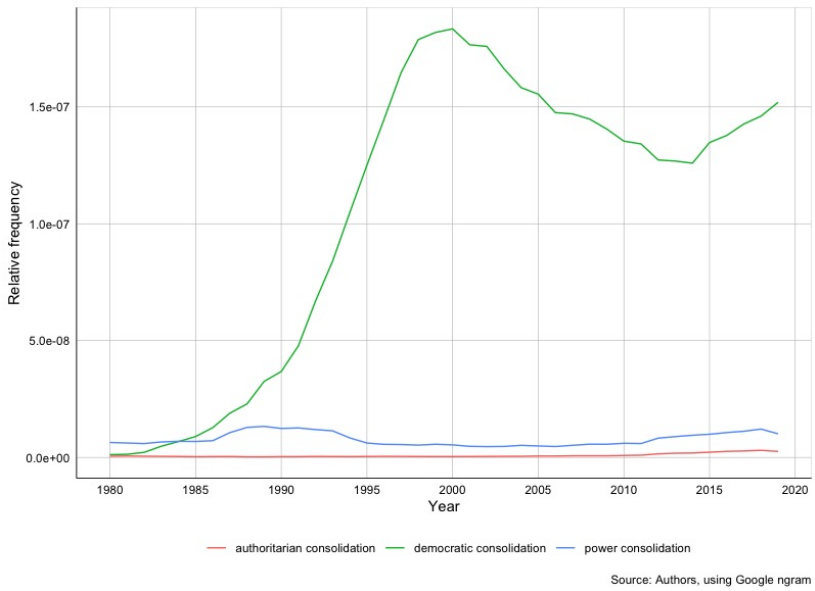

Figure 2. Google n-gram of subtypes of "consolidation" (1980-2019)

The usage of the term "democratic consolidation" has shown a pattern of growth that followed the onset of the third wave of democratization.

This occurred during the last two decades of the twentieth century and peaked in 2000, before beginning a steady decline. It is noteworthy that the use of this term far surpasses that of the other two search terms, which remain infrequently used over the 40-year timespan. Despite the processes of backsliding democracy and autocratization in the 2010s, there was little use of the term "authoritarian consolidation" during this period.

The limited scholarship available on authoritarian consolidation treats the concept as the antithesis of democratic consolidation, emphasizing attributes of persistence and non-reversal (Göbel, 2011; Croissant & Wurster, 2013; Ambrosio, 2014). According to Ambrosio (2014), authoritarianism is solidified and entrenched within a political system through a process that generates consistently pessimistic expectations for democratic regime change in the short-to-medium term. The term refers to a regime's tendency to solidify and strengthen its control over a country's political institutions, civil society, economy, and media.

As with democratic consolidation, authoritarian consolidation is considered to have a temporal component, with enduring regimes considered more consolidated, other things equal, those with less longevity. Although authoritarian survival and authoritarian consolidation are conceptually distinct, they are intertwined as far as survival is one empirically observable implication of consolidation. At the same time, authoritarian consolidation may not always guarantee stability in the longer term (Göbel, 2011). Some authoritarian regimes can persist for many years, while others may face eventual challenges and internal conflicts that may lead to their downfall or transformation. Indeed, passive persistence is not enough: as Croissant and Wurster defined it, "persistence is understood as the absence of change, e.g., the continuance or permanence of authoritarian subtypes" (Croissant and Wurster, 2013). By contrast, authoritarian consolidation seeks to understand the maturation of authoritarianism within a polity.

Differing slightly, Göbel conceptualizes authoritarian consolidation as "a deliberate state project to improve a regime's capabilities for governing society", substituting coercion with governance. He distinguishes between three different kinds of power: despotic (the power to coerce one's will on the people), infrastructural (the power inherent in regulating society through institutions and organizations), and dis-

cursive (the power to make people want what the government wants them to want). He hypothesizes that the durability of authoritarian regimes increases to the extent that regime elites manage to enhance their infrastructural and discursive capabilities.

Power consolidation

In non-democratic political systems, autocrats close off alternative paths of political development and strengthen their relative rule within the system. This is in addition to the regime's ability to control the governance structure of the state, secure the cooperation of the ruling coalition, and prevent challenges from fellow, illiberal elites. One term for this phenomenon, referred to as "power consolidation," relates to an individual's influence in a hybrid or authoritarian government. Scholars utilizing this term typically analyze authoritarian consolidation in terms of power consolidation, considering the contrast between elite accommodation and power-sharing versus personalization and concentration of power. According to their perspective, the consolidation of power is primarily determined by who holds power and the degree of it, rather than the institutionalization of norms and practices within a regime. For instance, Geddes, Wright, and Frantz (2018) devote an entire section of their book on dictatorship to the concept of "elite consolidation", which refers to the consolidation of power by leaders over military and security forces. Gandhi and Sumner (2020), on the other hand, write that "longevity is the result of settling into one of two equilibriums: one in which power is shared and the other in which it is consolidated".

Based on this discussion, then, there are several different competing understandings of what regime consolidation entails –especially authoritarian consolidation-, and of its key observable implications. There seems to be a focus on durability or longevity of the regime past a certain threshold, yet, durability and longevity of who, what, to what extent and to what ends? Plus, to what degree should a distinction be made between the consolidation of a ruler's influence in power, versus the consolidation of a regime as a whole? In what follows, we build on this discussion to offer our own understanding of authoritarian consolidation, prior to applying this notion to explain the Venezuelan case under Nicolás Maduro.

Dimensions of Authoritarian Consolidation

In our opinion, existing definitions and measures lack the ability to make qualitative distinctions in a regime's capacity to maintain and perhaps strengthen power. Therefore, it is necessary to differentiate between the consolidation of the regime and the consolidation of individual power. While these two phenomena are related, they are distinct and must be approached as such. Moreover, just as their democratic counterparts do, authoritarians must address the challenge of preserving their regime, securing it, and earning credibility from both the elite and general population. This holds true for contemporary politics as it has historically.

We propose a multi-faceted approach to authoritarian consolidation, based on the regime's ability to address three key aspects. The stability, acceptability, and embrace of these aspects by government actors and the population as a whole are important determinants of authoritarian consolidation. In our approach, these three domains indicate different levels of authoritarian consolidation. We aim to move away from an approach that sees authoritarian consolidation as a separate stage from lack of consolidation, as this is restrictive and potentially unhelpful. Adopting a multidimensional definition that highlights the dynamics of authoritarian consolidation allows for a more accurate classification and characterization of not only Venezuela under Nicolás Maduro, but also autocratic regimes worldwide.

To do so, we build on the seminal work of Schedler (1998), who identified five levels of democratic consolidation on the basis of several existing definitions and uses. These include: 1. Avoiding democratic breakdown, consistent with the classical meaning of consolidation ; 2. Avoiding democratic erosion, which is also consistent with the concern for regime survival, as well as the concern about the threat of more gradual regressions from democracy to semi democratic rule (O'Donnell, 1992); 3. Completing democracy by moving from electoral democracy toward liberal democracy, and therefore shifting from a democratic *government* to a democratic *regime*; 4. Deepening democracy by strengthening the roots of a liberal democratic regime; and 5. Organizing democracy through democratic institution building (Schmitter, 1995). On the basis of this synthesis, Schedler (1998) concluded that the concept of democratic consolidation is a "cluster

concept" without a meaningful common denominator, and advocated for returning to the concept's classical concern with democratic survival. With this approach, regime consolidation at its most basic level refers to expectations of regime continuity and to nothing else.

This reasoning applies across all types of regimes. Autocrats, like their democratic counterparts, must prevent authority breakdown and erosion, deepen and organize the regime, and generate legitimacy among elites and the population, all to survive and ensure long-term stability. The expectation of regime endurance defines authoritarian consolidation. Survival is not always equivalent to consolidation as the strength of a regime and the challenges to its survival differ. Pridham (1996) proposed the concepts of "negative consolidation" as a passive type of consolidation through survival and "positive consolidation" as a more active consolidation that results from regime legitimation at elite and mass levels. At the same time, we contend that survival serves as the hub of a radial category (Collier, Mahon Jr., 1993), which in turn frames the larger spectrum of definitions within authoritarian consolidation.

This minimal definition is at the heart of the four levels of authoritarian consolidation that we identify. They are:

> 1. Avoiding authoritarian breakdown, the basic condition of regime survival upon which all other conditions are predicated;
> 2. Avoiding regime liberalization (i.e., authoritarian erosion), which captures the regime's ability not only to survive, à la level 1, but avoid the risks associated with allowing free and fair elections or liberal democratic elements;
> 3. Completing authoritarianism, by shifting from an autocratic government or a diminished subtype of authoritarianism (i.e., competitive authoritarianism) to a fully autocratic regime;
> 4. Deepening authoritarianism, by eliminating the institutions of liberal democracy, and/or further consolidating formal and informal institutions associated with authoritarian logics.

The first two categories constitute the "negative" notions of consolidation, insofar as their concern is with eschewing rather than realizing change within the regime. As far as these definitions are concerned, maintenance of the status quo becomes the equivalent of consolida-

tion. To their detriment, since these conceptualizations are predicated on regime persistence, they cannot explain how authoritarians or their regimes have managed to survive. On one hand, the leader may share power with other political and economic elites, military officers, and/or other sectors of society, enabling their rule, while in the other, leaders may marginalize their supporting elites and concentrate power.

By contrast, the latter categories, which Göbel (2011) adopts as two of his three preferred definitions of authoritarian consolidation, constitute "positive" or "active" forms in which regime leaders aim to expand their influence and mitigate threats to their survival (Forcada, 2015). They explain how autocrats transition from a weakened form of autocracy to a hegemonic form of authoritarianism, solidifying their regime by eliminating institutional threats to its longevity.

It should be noted that our conceptualizations center on regime endurance and consolidation rather than individual power, as the latter can be independent of regime type. A leader can accumulate and concentrate power across various types of regimes. However, including both types would result in conceptual stretching, adding an attribute that reduces definition precision.

Moving on, let us examine whether Maduro's authoritarian regime is consolidated, considering the above-mentioned processes. Before proceeding, it is important to note that consolidation does not necessarily imply stabilization. On the contrary, consolidation and stabilization represent two separate concepts. While it is arguable that a consolidated regime will generally lead to stability, and conversely, stable regimes could be in a continual state of non-consolidation, this is not always the case. In the realm of consolidation, we are referring to institutions, norms, and practices internalized by a group of political actors, consisting of prominent members of the ruling coalition as well as members of the political opposition, in addition to other external actors and the entirety of the citizenry. While stability, defined as the absence of political turmoil or conflict, can be a crucial element in consolidation and vice versa, these are separate conceptual constructs.

Evaluating Authoritarian Consolidation in Venezuela

Maduro rose to power in a hybrid regime during unstable conditions, after his predecessor's death and facing a stronger opposition. Autocratization has been integral to both his survival strategy and his efforts to safeguard and consolidate his regime over time. While existing scholarly assessments hold valuable lessons, they remain inconclusive.

Rosales and Jiménez contend that Venezuela experienced a process of authoritarian consolidation after 2019, arguing that it is a result of the ruling elite successfully retaining power. Their logic is predicated on the fact that Maduro:

> […] (m)anaged to sustain elite cohesion, replace the previous opposition-controlled [National Assembly] with government loyalists in non-competitive elections held in December 2020, [and] has also initiated a transformation of the country's economy, from a highly centralized and statist system, to one with pockets of liberalized and deregulated markets. (Rosales and Jiménez, 2021)

They add that, "The autocratic consolidation of Maduro's regime has been catalyzed by its capacity to induce the atomization of the opposition" (Rosales and Jiménez, 2021, p. 432). However, beyond the specific mention of 'autocratic consolidation', they do not engage with what this notion implies, or with the consolidation literature. Their position on regime is consolidated needs to be inferred from the case narrative. While some aspects of their explanation correspond to the discussions articulated in the previous section, there is no explicit linkage with autocratic consolidation as a complex, protracted process that includes multiple coexisting aspects.

Similarly, Gandhi and Sumner's approach using the item response model for power consolidation arrives at a distinct conclusion. The point estimates obtained from their model suggest that while the dictatorship of Marcos Pérez Jiménez (1948-1958) was "consolidated," Maduro's authoritarianism is not, revealing essential distinctions in the power arrangement between military and civilian dictatorships. The numbers for the first category range from 1.1 to 1.4 on a scale of -3 to 3, signifying high consolidation. The scores for the second category range from -2.2 to -2.6, indicating notably low levels of consolidation. See the appendix for the complete figures. Although this latent variable

modeling approach provides benefits in cross-country and longitudinal comparability, its shortcomings are apparent. Consolidation is depicted as a latent trait validated by numerous empirical manifestations, which may bear little relevance to the actual consolidation of the regime. Examples include determining whether the military constrains the executive and if the country's leader serves in two or more political positions within a given year (Gandhi & Sumner, 2020).

Moving beyond these interpretations, we evaluate Maduro's Venezuela in light of the four dimensions defined above: 1. Avoiding regime breakdown (i.e., authoritarian survival); 2. Avoiding regime liberalization (i.e., authoritarian erosion); 3. Completing authoritarianism; and 4. Deepening authoritarianism, i.e., by further organizing an autocratic regime over time.

1. *Avoiding regime breakdown*: With respect to this criterion, it is safe to claim that the Maduro regime has done very well in avoiding regime breakdown. Maduro has endured in power since coming to the office in 2013, and since turning to authoritarianism as a survival strategy—at least since the opposition gained control of the National Assembly following the 2015 legislative elections (perhaps the last elections that counted with a modicum of electoral integrity in Venezuela). Although he faced threats to his survival at different moments between 2016 and 2023, his and his government's mere persistence are evidence of authoritarian consolidation at this most basic level.

As we pointed out above, Maduro's regime managed to withstand severe threats against its rule at several points in time since 2013, and most recently in 2019 and 2020. Although these threats did not lead to regime change, they were credible and strong enough for many observers to claim (Forcada, 2015), over and over, that "Maduro tiene los días contados" ("Maduro's days are numbered"). However, these claims did not eventuate, even when facing extreme conditions.

A good example of major differences within the ruling coalition that implied possible fissures at a critical time was the open challenge of Venezuela's Attorney General, Luisa Ortega Díaz to the Venezuelan High Court's decision that sought to strip the opposition-controlled National Assembly of its prerogatives in late March 2017 (Mogollón & McDonnell, 2017). Once a relentless ally of the regime, Ortega

Díaz denounced the event as a rupture of the constitutional order, and became a major opponent until her dismissal by the Constituent Assembly in August 2017. At the time, Ortega Díaz's move was perceived as reflective of simmering discontent within Chavismo, and helped to embolden opposition forces and their efforts to press for change via increasing social mobilization (protests). However, the Maduro regime managed to keep its coalition from breaking down and resisted the efforts, even if this involved a decided anti-democratic step by convoking a Constituent Assembly on very dubious legal grounds and increasing its repression against protesters and other political opponents.

Perhaps the regime faced its most significant challenge in January 2019, when the National Assembly refused to recognize Maduro as president and instead declared Juan Guaidó as interim president until a democratic transition was achieved. In the following weeks, various countries denounced the regime and refused to recognize Maduro as president, supporting Guaidó instead as interim leader. In addition, there were protests against the regime demanding Maduro's resignation. This resulted in mounting threats against the regime. Furthermore, a joint effort by military officials and civilians called "Operación Libertad" took place from April 30 to May 2, aiming to force Maduro out of power. This attempt involved releasing opposition leader Leopoldo López and publicly condemning the regime by the director of the Venezuelan intelligence service (Servicio Bolivariano de Inteligencia Nacional, SEBIN), Manuel Figuera. Nonetheless, the Maduro regime remained in power and avoided collapse once more, resulting in failure.

Overall, these are but two examples of clear manifestations of rifts within Maduro's ruling coalition that did not lead to breakdown. And, again, Maduro continued to be successful despite deteriorating external conditions and overt efforts to break down the regime- a key aspect of authoritarian consolidation. As of 2023, this continues to be the case, the regime remains in place, and the prospects of breakdown are very dubious.

2. *Avoiding regime liberalization:* Maduro's noted ability to retain power has taken place whilst engaging in a process to avoid regime liberalization. The attempt to prevent regime liberalization involved managing and controlling the remaining "contestation arenas" that were a legacy

of Hugo Chávez's hybrid regime. Therefore, by 2013, the democratic system was heavily biased towards the regime in all pertinent areas, including but not limited to elections, the judiciary, the military, and the media. However, these domains and their institutions were subject to the authoritarian logics of the regime, thus preventing the political opposition, civil society actors, and the citizenry as a whole from effectively using them to democratize or further liberalize the regime. This effort is crucial for regime survival (see above) and essential to exerting authoritarian control over the Venezuelan state and society.

A good case in place is the judiciary and its key role to both block the legal route to challenge the regime, and serve as a tool to block other institutional mechanisms to hold the regime accountable. By the time Maduro came into power, the Venezuelan judicial system had already been subject to a process of creeping politicization and capture. With a strong record of deciding politically salient cases in favor of the regime, and with a judiciary staffed with judges who held informal connections of different sorts with the regime, there were no reasonable prospects of using legal recourse or try cases to challenge Maduro's authority. However, as explained in Sanchez Urribarri (2021), the court's support for the regime was not only *reactive* – that is, to defend the regime in the case of attacks – but proactive, i.e., to go out of its way to back Maduro's efforts against the opposition in different areas, and even act *motu proprio* to these ends. Perhaps the best example of this ongoing willingness to assert its authority in order to prevent regime liberalization was its ongoing effort since 2016 to block the opposition-controlled National Assembly, question its institutional legitimacy from its installation, and systematically decide against the Assembly over a hundred cases brought by pro-regime actors.

3. *Completing authoritarianism*: This third dimension pertains to fulfilling an authoritarian agenda, specifically, the establishment of institutions and practices that revolve around a particular form of authoritarian governance. This category involves authoritarian leaders reinforcing fundamental aspects of their regime, preventing liberalization efforts, and expanding their influence to promote authoritarianism as the primary authority. Debating whether this occurs in a particular country with specific regime conditions is a challenge as it involves defining and operationalizing specific thresholds. Additionally, determining when a regime's evolution is considered 'complete' is sensitive

to various understandings of its completion. Furthermore, considering the lack of transparency that often characterizes autocratic regimes, it is necessary to remain alert to unforeseeable or difficult-to-predict developments that may require updates to current status.

That being said, we contend that Maduro has yet to achieve his authoritarian goals in Venezuela. The regime's internal politics remain unstable, with influential actors vying for dominance within a constantly developing ruling coalition. Opposition forces have the means to prevent Maduro and his regime from achieving definitive stability, which creates the impression that the *Madurista* hegemonic autocracy has matured and is resistant to further changes. Although Madurismo has not yet realized a total authoritarian project, the regime has made significant strides in this direction in recent years. Whether the government will inevitably become a dominant regime - an outcome that appears increasingly probable - or settle into a regime that provides at least some meaningful participation to the opposition (beyond extremely restricted spaces) remains an unanswered question. However, to achieve this goal, it is essential for the government to persist in augmenting and organizing former and new authoritarian practices and techniques, which leads us to the subsequent point.

4. *Deepening and organizing authoritarianism*. Under this category, we assess the regime's capacity to reinforce its position and advance its governance objectives over time. Although this is a time-consuming process that requires monitoring the regime's trajectory, we can measure its performance by examining capacity levels at specific intervals relative to opportunities presented. Bearing this in mind, the *Madurista* regime is developing authoritarian institutions and practices openly. There is growing evidence that it is organizing its rule along these lines, and that authoritarian practices are increasingly occurring with sophistication.

Given the text already adheres to the principles and lacks context, the improved version is: A good example of this lies in the regime's increasing reliance on authoritarian allies and ideologically-minded governments worldwide to safeguard and expand its rule. In recent years, the Maduro administration has bolstered its formal and informal alliances with China, Cuba, Iran, Turkey, and Russia, forging integral connections with these nations to fortify its grip on power and

withstand pressures arising from economic instability and sanctions imposed by the United States and other Western countries (Arnson, 2021). These affiliations have assisted Maduro in navigating challenging circumstances and cementing his authority. These are not fleeting partnerships - they are crucial to the regime's future. Maduro has taken significant steps to establish itself as a committed ally of these powers in Latin America and worldwide.

Concluding Remarks

What is authoritarian consolidation? The regime of Nicolás Maduro has withstood numerous crises and has shifted towards authoritarianism, but has it truly coalesced into a consolidated autocracy? In this article, we survey the literature on regime politics to assess authoritarian consolidation. We provide a conceptual framework to evaluate the various dimensions of authoritarian consolidation from a comparative perspective and apply this theoretical lens to determine the extent to which the Venezuelan regime under Nicolás Maduro has consolidated. Our aim is to offer an objective assessment of the consolidation process, avoiding any subjective evaluation. We use a clear and concise language and follow conventional academic structure, adhering to consistent citation and footnote formatting. Additionally, we maintain a formal tone, precise word choice, and grammatical correctness. Finally, we strive for a balanced view, avoiding any biased or emotional language. This provides clarity not only in regards to Venezuela's path towards consolidating authoritarianism but also in assessing the changing authoritarian conditions in the region and worldwide. Ultimately, the issue of authoritarian trajectories and consolidation remains more crucial than ever, given governments such as Nicaragua under Daniel Ortega and El Salvador under Nayib Bukele, who, to cite two striking examples, have actively pursued the dismantling of democracy and engaged in autocratic practices.

Furthermore, our definition strives to encompass numerous facets or dimensions of authoritarian consolidation. Plus, survival is a critical component of consolidating authoritarian rule. If the regime collapses, consolidation becomes impossible. However, survival during crises is not the only relevant aspect. It is important to distinguish between

surviving crises and consolidating authoritarianism in the analysis.

Based on these premises and following our proposed multidimensional conceptualization, the Maduro government has not only avoided regime breakdown and regime liberalization—especially with respect to the key tenets of Maduro's political survival and the regime's ability to fend off attempts to liberalize it and seek re-democratization—but is also at work on both completing and deepening the regime. Between 2013 and 2020, there were overt attempts to challenge Maduro, and significant uncertainty existed about their prospects for success, reflecting the regime's perceived weaknesses. By contrast, the paucity of legitimate threats to Maduro's rule since 2020 suggests the opposite: that he is now firmly entrenched in power and no longer perceived as weak.

NOTAS

1. The views expressed herein are solely those of the authors and do not represent the views of or endorsement by the United States Naval Academy, the Department of the Navy, the Department of Defense, or the United States government.

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APPENDIX

Table A1. Latent variable model estimates of authoritarian consolidation in Venezuela. Source: Authors' estimates using model developed by Gandhi and Sumner

Year	Leader	xhatmean
1948	Carlos Delgado Chalbaud	1.09968992
1949	Carlos Delgado Chalbaud	1.16024873
1950	Marcos Pérez Jiménez	1.31168187
1951	Marcos Pérez Jiménez	1.3765127
1952	Marcos Pérez Jiménez	1.38329201
1953	Marcos Pérez Jiménez	1.38979646
1954	Marcos Pérez Jiménez	1.3979046
1955	Marcos Pérez Jiménez	1.40055959
1956	Marcos Pérez Jiménez	1.40388675
1957	Marcos Pérez Jiménez	1.40230672
1958	Wolfgang Larrazábal	0.98623161
1999	Hugo Chávez	-2.296793
2000	Hugo Chávez	-2.43213
2001	Hugo Chávez	-2.535955
2002	Hugo Chávez	-2.580603
2003	Hugo Chávez	-2.614659
2004	Hugo Chávez	-2.626803
2005	Hugo Chávez	-2.632853
2006	Hugo Chávez	-2.62136
2007	Hugo Chávez	-2.596426
2008	Hugo Chávez	-2.574894
2009	Hugo Chávez	-2.554278
2010	Hugo Chávez	-2.532311
2011	Hugo Chávez	-2.499668
2012	Hugo Chávez	-2.446741
2013	Nicolás Maduro	-2.196854
2014	Nicolás Maduro	-2.333172
2015	Nicolás Maduro	-2.413155
2016	Nicolás Maduro	-2.449906
2017	Nicolás Maduro	-2.477061
2018	Nicolás Maduro	-2.48693
2019	Nicolás Maduro	-2.492158
2020	Nicolás Maduro	-2.49021

2021	Nicolás Maduro	-2.469556
2022	Nicolás Maduro	-2.441171
2023	Nicolás Maduro	-2.396957

Party System Collapse and Democratic Decay in Venezuela: From Ideological Convergence to Institutional Polarization

Jana Morgan

Throughout the second half of the 20th century, Venezuela was a beacon of liberal democracy in Latin America. While many of its neighbors in the region suffered under repressive authoritarian regimes, in Venezuela free and fair elections were routine, and power alternated peacefully between competing political parties. However, while democracy was becoming common throughout the region in the late 20th century, Venezuela underwent a period of deinstitutionalization, extreme polarization, and democratic erosion. This led to the establishment of an increasingly entrenched authoritarian regime, making the country an indicator for the current wave of democratic decay in various countries

across Latin America and beyond.

This paper argues that Venezuela's democratic erosion began during the 1990s representational crisis, which caused the collapse of the country's traditional party system. This facilitated the rise of Hugo Chávez and shaped the nature of political competition that followed, marked by polarization rooted in different views regarding the significance and legitimacy of liberal democratic institutions. This institutional polarization has resulted in the deterioration of democracy and posed a significant challenge to reinstating democratic principles.

In the succeeding pages, I will elaborate on each of these points. Firstly, I summarize prior research that describes how a representational crisis led to the collapse of the party system. Following this, I explore how this collapse created an opportunity for a populist challenger and significantly altered the political landscape. I explore how polarization within institutions on the importance and goals of democratic institutions is contributing to the erosion of democracy. I conclude by reflecting on how we can learn from these experiences to better understand similar erosion processes elsewhere and consider potential paths forward.

Representational Crisis and Party System Collapse

Political parties play a crucial role in the achievement of a fundamental goal of representative democracy, which is to give citizens a voice and influence in the political processes and decisions that affect their lives (Luna *et al*., 2021). Party systems serve as the primary means of connecting ordinary citizens to the state, and ideally they should accomplish this task by providing voters with valuable programmatic choices that enable them to vote for a vision of society that aligns with their interests and aspirations when they go to the polls. If linkage does not adopt meaningful programmatic options, parties can still foster citizens' attachment to the democratic order by including significant sectors of society and ensuring some form of voice or influence for these groups, or by providing people with tangible benefits through clientelist exchanges (Kitschelt & Wilkinson, 2007; Luna, 2014).

Parties that do not fulfill their primary responsibility of establishing connections through one or more of these methods are prone to deterioration. When all parties in the system lose their collective linkage capacity, the political party system as a whole becomes vulnerable to collapse. A prime example lies in the Venezuelan party system, which collapsed in 1998. In other words, Venezuelans rejected not just the ruling party, but also all the options tied to the traditional system (Morgan, 2011).

To comprehend the fall of a whole party system, it is crucial to account for both structure and agency. This is necessary because we must explain not only the decline of a single party, which is commonplace, but instead the rejection of the entire system. Generally, the deterioration of linkage occurs when structural changes threaten existing strategies for linkage while contextual limitations prevent the necessary adaptations to respond to such threats (Morgan & Meléndez, 2017; Roberts, 2014). However, each form of linkage has unique susceptibility to various structural threats and distinct constraints on the required adaptation. In this way, to comprehend the collapse of a party system, it is essential to outline the linkage profile of the party system and subsequently identify the exact structural obstacles and contextual limitations that eroded each linkage strategy within the system.

At its height, the traditional Venezuelan party system maintained three major linkage strategies. First, there was programmatic representation, which took two forms: Public policies that responded to the most important problems of the country as well as ideological options presented by different parties in the system (Karl, 1997; Morgan, 2007); second, parties provided group-based linkages, which incorporate major sectors of society along the worker-owner divide into the party system (Martz & Myers, 1994; McCoy, 1989), and finally; parties used clientelist exchanges to provide simple material benefits to those marginalized from other forms of linkage.

Beginning in the 1980s and accelerating in the 1990s, each of these linkage strategies lost the capacity to connect citizens to the democratic system. Identification with the two major parties, Acción Democrática and COPEI, decreased from 70% in 1988 to less than 20% by the end of the century (Morgan, 2007). The parties no longer retained control of the legislative and executive branches and the logic of partisan

competition shifted entirely. Representational crisis was the cause of the collapse of the system in 1998 (Morgan, 2011).

What caused such a significant collapse? Why did Venezuelans not only reject the ruling party but also turn away from all the options within the traditional party system, leading to the decline of all the old parties and the transformation of the party system? A comprehensive analysis of the Venezuelan party system collapse required detailed examination of the structural challenges and contextual limitations which hindered each linkage strategy. To this end, we need to explain why programmatic representation could not be sustained by the parties, how their group-based incorporation was curtailed, and why clientelist capacity was insufficient to meet demand. And it is imperative to analyze the concurrent events that led to a severe representational crisis and the breakdown of the entire political party system.

When considering programmatic representation, three factors come together to hinder linkage capacity: a basic crisis that questions the fundamental logic of policymaking, external constraints that restrict the policy response to the crisis resulting in only unpopular or unworkable options being available, and inter-party agreements that involve all the major parties in the unsuccessful response to the crisis. In Venezuela, the decade leading up to the collapse of the party system witnessed all three elements of the process.

An economic crisis emerged, demanding significant innovations in public policies (Roberts, 2014). Venezuela's political economy was fundamentally based on oil revenue distribution (Karl, 1997), a plan that ceased to function in the 1990s. At the same time, international financial institutions offered a range of policy options that imposed fiscal and political restrictions, hindering the governing parties' ability to respond efficiently and effectively to the crisis (Corrales, 2010). As a result, the only political options available to counter the crisis were either unpopular, ineffective, or both. Therefore, the political parties in power during the 1990s were unable to provide objective answers to the main issues affecting the population.

This lack of programmatic representation reached the system level when a series of interparty agreements committed all the major parties in the system to this unpopular and ineffective policy response.

Interparty compromise and conciliation had long been common in the Venezuelan party system (Coppedge, 1994), but throughout the 1990s these arrangements became more frequent and more formal. During the five years preceding collapse, Acción Democrática and COPEI had entered into repeated and public agreements with each other as well as Rafael Caldera's Convergencia and even the most significant parties on the left including Movimiento al Socialismo and La Causa R (Morgan, 2011, pp. 118-119). These agreements, which formally aligned traditional parties across the entire ideological spectrum, obscured programmatic differentiation between the parties and effectively eliminated any meaningful alternative to the neoliberal status quo from the traditional party system (Fernández, 2001; Lupu, 2016; Morgan, 2011).

In the waning years of Rafael Caldera's second term in the presidential office, Venezuelans became increasingly frustrated with both the ongoing crisis and the government's lack of an effective policy response, a situation that caused widespread popular discontent. Interparty agreements and successive governments' adherence to the neoliberal status quo, despite their stated ideological commitments or election promises, has led to a frustration with the failed status quo that goes beyond rejecting individual political parties. This dissatisfaction has escalated to the level of the entire system, as voters perceive no significant policy differences between the major parties and cannot identify any alternatives within the system.

Finding an alternative required looking beyond the traditional party system, as programmatic representation failed throughout, contributing to an exodus from the traditional parties and the political and economic status quo they represented. This facilitated the rise of an anti-system option that offered a substantive policy response to the crisis and could credibly promise a departure from the neoliberal status quo: Hugo Chávez.

Regarding the incorporation of major sectoral interests, Venezuelan parties historically included interests on both sides of the worker-owner divide. However, significant social transformations in the 1980s and 1990s redirected the focus of interest competition away from this traditional division and towards inclusion in or exclusion from the informal economy. Structural changes in the economy have reduced

the formal sectors on both sides of the traditional worker-owner divide, while simultaneously expanding the proportion of the population reliant on more informal sources of income. Specifically, the informal sector has constituted half of the workforce in the latter part of the 20th century. The unemployment rate doubled from the 1980s to the 1990s, and 70% of the population lived in poverty. Additionally, union membership decreased by over 60% during this period (Morgan, 2018, pp. 298-299).

The organizations required a significant reorientation to cope with these changes and to integrate the informal sector alongside their traditional bases in the formal sectors of the economy; but it was difficult to pivot in this way as the nature of informal sector interests along with the parties' existing organizational structures made such adaptation efforts a high-risk proposition. The informal sector did not have mass-based organizations that could be readily mobilized, and their interests often seemed to be in conflict with those in the formal sectors who had long constituted the core bases of the parties, especially unions.

In addition, the hierarchical incorporation strategies of the parties prevented the integration of the diverse and varied interests of the informal sector: None of the parties, including the left-wing factions, attempted to incorporate the growing informal sector. Such adaptation efforts were extremely precarious under the parties' current organizational structures, and there was a complete lack of interest in making any attempts to do so. As a former president of MAS told me in an interview, "the traditional system [of political parties] excluded millions of Venezuelans, there was a lack of opportunity, poverty and misery. This exclusion today constitutes the main conflict in Venezuelan society."

The party system could not adapt to this transformed social reality, and as a result, the portions of the Venezuelan population reached through sectoral-based linkage strategies narrowed. Those in sectors marginalized from the system of interest incorporation abandoned the traditional parties at much higher rate than those in incorporated group members who were twice as likely to remain aligned with the old system (Morgan, 2018, p. 299).

Clientelism emerged as the primary linkage strategy among marginalized sectors. Nevertheless, the feasibility of using clientelist options also waned. Clientelism is not a reliable way of promoting steady linkage, which makes it vulnerable to fluctuations in supply and demand (Piattoni, 2001). In Venezuela during the 1990s, clientelist demand increased, while supply constricted. Demand increased due to social changes that marginalized more people from traditional group-based incorporation and electoral decentralization, which multiplied the need for clientelist exchanges at the subnational level (Lalander, 2004; Morgan, 2018). Supply decreased due to the economic crisis and the series of reforms that removed remaining resources from the domain of clientelist distribution (Baptista, 2005).

As demand grew faster than supply, more and more people perceived clientelism as an exclusive practice, turning it into something resembling corruption rather than a legitimate form of political networking (Morgan, 2018). Despite research indicating that corruption played a significant role in the disintegration of the party system (Seawright, 2012), the notion of corruption as a widespread issue only gained traction after the decay of political networking had already set in. The prior perception of corruption within the general public was viewed as lenient (Romero, 1997, p. 19). During the mid-1990s, a majority of Venezuelans appraised the government's efforts to combat corruption favorably. However, following the acuity of the economic crisis and limited supply, coupled with increasing clientelist demand, there was a shift in the opinion towards a more negative outlook on corruption as an unresolved issue (Morgan, 2018, p. 301). Consequently, the legitimacy of the system was delegitimized by the decay of clientelism.

With the failure of programmatic representation, the narrowing of interest incorporation, and the decay of clientelism, all major forms of linkage lost capacity in the 1990s, and a majority of Venezuelans were unmoored from the traditional party system (Morgan, 2007, 2011). Consequently, the system collapsed, opening the door to the rise of *chavismo*, which stepped into the linkage gaps left by the old system.

Populism and the Restructuring of Contestation

The collapse of the traditional party system was a critical juncture for Venezuelan politics (Roberts, 2014). Collapse opened the door to a populist challenger and fundamentally restructured the nature of political contestation. In this way, explaining the causes of the party system's collapse helps make sense of the political order that emerged in its wake, which is my intent here.

To begin, it is important to understand that *chavismo* emerged as the successor to the failed party system. Many of its fundamental characteristics derive from its origins as a movement reacting against the stasis that the old system had come to impose and promising to fill the gaps in representation that led to its demise. Characteristics including the social base of the movement, its ideology, and its efforts to disrupt old practices of negotiation and *acuerdos* (compromise among major stakeholders) between political elites are rooted in this reaction against old patterns (Morgan, 2018).

For instance, the traditional parties centered their attention on including the formal sectors through appeals based on groups. However, this led to large segments of Venezuelan society being cut off from the old system, and *chavismo* utilized these marginalized sectors for support. *Chavista* leaders explained in interviews how the traditional parties' inability to connect with the poor, the unemployed, and the informal sector enabled them to establish their base effectively. In its early years and under Chávez's leadership, *chavismo* presented policy proposals and implemented programs concentrating on meeting basic needs and investing in human capital development for these communities. Impoverished Venezuelans and individuals dependent on informal sector jobs reacted positively.

Even in years when *chavismo* enjoyed widespread support, those belonging to traditional marginalized groups were more likely supporters than those who were more affluent or in the formal sector (Canache, 2002; Hellinger, 2003; Molina, 2002). These typically marginalized groups have exhibited greater dependability and zeal in supporting *chavismo* during periods of stress and uncertainty. This tendency was evident when economically disadvantaged and unorganized Venezuelans mobilized to support the regime during

the 2002 coup attempt, the opposition-led general strike later that year, and the 2004 campaign for recall referendum on the president (Ciccariello-Maher, 2013; López M. & Lander, 2007). Support from sectors outside of the traditional party system has been essential to *chavismo*'s legitimization of their power through elections. Moreover, lower-income and less-educated Venezuelans are significantly more likely to align themselves with the *chavista* apparatus (García-Guadilla, 2005; LAPOP, 2012; Valencia, 2005). As recently as the 2020 election cycle, public opinion data suggested that approval of the incumbent *chavista* government was three times higher among Venezuelans in the bottom income strata than those in the middle, while the alternative government headed by Juan Guaidó was evaluated favorably by twice as many people in the middle as compared to the bottom strata (Datanálisis, 2020).

We observe similar patterns when we consider the geographical distribution of votes, with *chavista* candidates tending to attract larger vote shares in poorer regions and neighborhoods (García-Guadilla, 2005; López & Lander, 2007; Morgan, 2018). Of course, the movement has also attracted support from new economic elites emerging under *chavista* rule as well as some elements of the old parties' traditional support bases in the formal sector (Cyr, 2013; Ellner, 2013); but its core base and by far its largest set of supporters comes from those marginalized from the group-based incorporation strategies employed by the old system.

Similarly, *chavismo* pledged programmatic connection where the historic parties failed. As conventional parties ideologically aligned with a neoliberal agenda, Chávez introduced a left-leaning substitute. This stance enticed those positioned on the ideological left and the ones dissatisfied with the neoliberal status quo in general (Molina, 2002). *Chavista* politicians and supporters in the general public continue to ideologically position themselves further to the left compared to those aligned with the opposition. The movement's rhetoric has consistently maintained its left-leaning traits during its time in government, despite tangible programmatic policymaking initially being significant and expanding social policies for poor and marginalized sectors. However, such policymaking has largely disintegrated (Lopez, 2011; Morgan, 2011, 2018). Overall, *chavismo*'s appeals to marginalized sectors and left-wing ideological positioning enabled Chávez's rise to power and

have lasting effects on the movement's contours.

The drawbacks of the traditional party system also shaped the alternative that emerged to take its place in other significant ways. Perhaps most notably, the old system was controlled by a group of political elites determined to uphold the existing economic, social, and political order, despite its collapse. The incapacity of this group to adjust discredited the entire political system, as outlined above. This delegitimization process not only weakened particular parties or leaders, but it also tainted the entire political framework.

As a result of a yearning for a significant deviation from the existing state of affairs, Chávez presented himself as the solution. Although he proffered an unconventional programmatic agenda and extended an olive branch to marginalized groups, as highlighted earlier, Chávez's political logic represented a complete departure from tradition.

Hugo Chávez pledged to alter entrenched political procedures and promote the will of the people, attracting those dissatisfied with the customary practices of interparty agreements and intra-elite negotiations that typified the former system (Hawkins, 2010). Instead of allocating resources to party organizations, Chávez cultivated a devoted following. He employed a populist discourse and made personal appeals based on his charisma and status as a political outsider, which legitimized his promises to upend the prevailing order (Hawkins, 2009; Sagarzazu & Thies, 2019). These aspects of *chavismo* placed the post-collapse system in stark contrast to the conventional norms and procedures of the former party system, which was dominated by an entrenched elite.

With this shift, post-collapse politics in Venezuela display several concerning elements that jeopardize democracy. The process of deinstitutionalization has now encompassed almost all significant public and private institutions, which began with the party system. However, upon their initial rise to power, the *chavista* government perceived several aspects of the standard institutional structure as jeopardizing the establishment of their new political regime. Consequently, *chavistas* took action to erode and abolish various institutions that could have acted as a check on their authority. One of the primary deinstitutionalization efforts was the complete rewriting

of the constitution. However, this process had a widespread impact on both government and civil society institutions and affected institutions of all kinds, including organized labor, media organizations, opposition parties, state agencies, the legislature, and the courts, across the traditional political spectrum.

In addition, because the primary potential counterweight to *chavismo* —the opposition in its various iterations— has been repeatedly defeated both in the streets and at the polls, efforts to keep this process of deinstitutionalization at bay have floundered. Instead, elements of the opposition have also used extra-institutional strategies that have served to discredit and undermine political institutions. Most overtly, the 2002 coup attempt circumvented democratic processes that were still intact at the time; but other more subtle moves, such as boycotting elections or failing to invest in party building, also contribute to the enervation of institutions and procedures that are integral to democracy (Hsieh *et al*., 2011; López & Lander, 2007; Sagarzazu, 2011).

Instead of centralized and potentially fossilized institutions dominating society and politics, as was the case during the *puntofijista* era (cooptation by and compromise among stakeholders of the political elite), personalism is now the dominant force in Venezuelan politics. The most prominent example of this phenomenon was the oversized presence of Hugo Chávez. However, beyond Chávez, contemporary discussions of Venezuelan politics largely revolve around individual names, personalities, and conflicts rather than institutional frameworks and organizations. As a result, the Venezuelan political landscape for the past 20 years has consistently revolved around a personalist divide between the *chavistas* and anti-*chavistas*, as noted by Cyr (2013) and Morgan (2018).

Institutional Polarization and Democratic Erosion

These dynamics of deinstitutionalization and personalization in politics, which often occur after a collapse of party systems, not only in Venezuela but also in other post-collapse contexts like Italy, Greece, and Spain, can endanger democracy in several ways (Casal B. & Rama, 2020; Halikiopoulou & Vasilopoulou, 2018; Taggart & Rovira-

Kaltwasser, 2016; Verbeek, 2016; Vidal, 2018; Zanotti, 2021). The challenges of achieving lasting political agreements are exacerbated by deinstitutionalization and personalism. Institutions play a critical role in ensuring that agreements are not only binding for those present at the negotiating table at a specific moment, but also for a broader set of institutionally involved actors over an extended period of time. Without institutions to facilitate productive debates and commitment to creating and maintaining solutions, conflict tends to intensify and become more volatile. Political differences in Venezuela have become increasingly extra-institutional since the collapse of the party system, manifested in street protests and on the international stage, extending well beyond the structured confines of domestic political institutions.

In addition to heightened conflict, the post-collapse setting is also vulnerable to a distinct type of conflict, typically revolving around disagreements about the foundational goals and structure of the political system. While there are some conventional ideological differences between the government and opposition, these partisan divisions are not the primary aspect of conflict (Morgan, 2018, pp. 312-313). Any differences between the left and right pale in comparison to the deep chasms of personal loyalties and struggles for control over the state. Winning control of the state is not about pursuing different policy goals but rather deciding the rules of the political game (Hawkins, 2010). This means that polarization is more institutional than purely ideological (Roberts, 2022).

Ideological vis-à-vis Institutional Polarization

Much of the increasing scholarly focus on polarization views the phenomenon as a matter of degree instead of a fundamental difference. This perspective is rooted in Giovanni Sartori's seminal work from 1976, which defined polarization as the ideological gap between political parties. Many attempts to comprehend the origins and outcomes of polarization initiate with this theoretical framework, and then move on to construct empirical measures that highlight the degree of divergence between parties within the policy spectrum (e.g., Hetherington, 2001; Poole & Rosenthal, 1984).

Some research notes that the polarization most concerning for democracy in contemporary politics involves clustering into social and political groups. This leads to competing clusters developing an us-versus-them mentality that pits two opposing sides against each other (e.g., Arbatli & Rosenberg, 2021; McCoy, Rahman, Somer, 2018). This conceptualization recognizes that the type of polarization that can weaken democracy and jeopardize social cohesion and political order takes on a different tenor than can be captured by simply focusing on ideological distance. According to this perspective, polarization measures aim to capture the clustering of political society into ideologically distant groups, as opposed to distance alone (e.g., Dalton, 2008; Esteban & Ray, 1994). While this approach surpasses ideological distance and aims to grasp Manichean conflict, it is still grounded in a Sartorian logic that emphasizes ideology as the heart of the conflict. The majority of this research still portrays polarization in terms of ideological extremes, rather than examining the core issues that drive polarization, as I do here (but see Garcia-Guadilla & Mallen, 1999; Roberts, 2022).

The identification of the central node of conflict around which polarization occurs is vital both conceptually and theoretically. This is because certain types of polarization are expected, normal, and even essential for democratic representation, while other types are harmful and may even run counter to democracy (McCoy, Rahman, Somer, 2018). In my research, I delimit two distinct forms of polarization, with varying central nodes of conflict.

The first kind is **ideological polarization**, which follows the classical Sartorian conceptualization and emphasizes the ideological distance between parties. In this category, diverse parties or participants within the democratic system hold distinct goals for what the government should strive to achieve and how it should be done. We frequently associate polarization with a left-right divide, but it can also manifest across other policy domains. These may include competing stances on immigration, religion, or urban-rural divides, among others. Greater discrepancies over programmatic goals result in heightened polarization. The second kind is **Institutional polarization**, which is predominantly about democratic institutions and procedures. The varying interpretations of the value and purpose of democracy lead to greater polarization. As I explain below, the modes of polarization have

different implications for the practice and maintenance of democratic politics, as different focal points of conflict emerge in ideological and institutional forms.

Ideological polarization is ubiquitous in democratic contests where diverse political actors deliver distinctive policy choices. Indeed, the notion of programmatic representation, as described previously, mandates a certain degree of ideological polarization to offer voters significantly meaningful policy alternatives. Having programmatic options in this fashion allows individuals to assess various policy perspectives and select the one that aligns best with their personal interests and priorities. Therefore, ideological polarization promotes programmatic representation via policy distinctions among parties in the democratic system.

We can see the role that this ideological polarization can play within ordinary democratic contestation by considering the heyday of Venezuela's traditional party system. During the 1960s, 1970s, and into the 1980s, Acción Democrática and COPEI offered ideological options to voters, which played a role in supporting programmatic representation during that period. This programmatic differentiation between the parties was far from harmful to democracy. Rather, it was integral to the stability of the party system and the institutionalization of democratic competition. Conversely, as I have discussed above, when the parties converged ideologically —in other words, as ideological polarization evaporated completely— the old system became vulnerable. The deterioration of programmatic representation put increased pressure on other forms of linkage and ultimately paved the way to party system collapse and the rise of authoritarianism. Cross-national research also suggests that this pattern in which democratic institutions erode as a result of ideological convergence (or lack of ideological polarization) is not unique to Venezuela but has contributed to party system decay and broader democratic decline in many other contexts as well (Berman & Kundani, 2021; Morgan, 2011; Roberts, 2014).

Chávez capitalized on the ideological alignment within the previous system, gaining support from left-wing voters who preferred a more interventionist state over the dominant neoliberal policies presented by the traditional parties toward the end of the old system. The remaining

ideological gap between *chavismo* and the leading opposition options persists, with the opposition being more inclined towards market-based economic policies than the more interventionist *chavistas*. However, the intense polarization presently defining Venezuelan politics cannot be explained by the small divergence between the two factions in terms of conventional left-right ideological differences.

Rather, the primary form of polarization that drives a deep wedge between *chavistas* and anti-*chavistas* today is of a different sort entirely —it is what we can call institutional polarization (Roberts, 2022). Institutional polarization is less about the role of policy and more about the goals and nature of democracy. As Ken Roberts defines it, institutional polarization "entails frontal conflict over the basic rules of the political game —rules that were designed and evolved, in large part, to process and manage political conflict itself" (2022, pp. 17-18). Here the division occurs between forces on one side that emphasize the rules and practices of a liberal democratic order —things like free and fair elections and the rule of law—and those on the other side who are more interested in substantive policy goals and who are perhaps more willing to compromise or actively undermine liberal democratic procedures in pursuit of these goals. This second form of polarization is a more fundamental divide that is focused not just on competing policy paths within a shared commitment to the basic rules of the game, but instead is a more fundamental form of polarization about the purpose and value of liberal democracy itself.

In Venezuela, polarization between institutions divides the government and opposition over the importance of formal democratic rules such as elections and respect for civil liberties versus the pursuit of substantive goals like social equality and the interests of the general public (García-Guadilla & Mallen, 2019; Hawkins, 2010; Morgan, 2018). Surveys indicate that these issues consistently differentiate *chavistas* and anti-*chavistas*. For example, opposition supporters tend to prioritize civil rights, political parties, and democracy as the optimal form of governance, while those who support the government often favor direct democracy without institutional mediations and are accepting of non-democratic government institutions (Datanálisis, 2020; LAPOP, 2012; Morgan, 2018).

Of course, these opinions are not merely theoretical commitments to a particular style of government, but rather indicate the position each group holds regarding the current power structure. The opposing side is understandably more focused on civil rights and protections for minority groups since they lack control of the government. Consequently, they are more open to foreign involvement in domestic politics (Datanálisis, 2020). Today, in Venezuela, polarization regarding the importance of liberal democratic institutions and practices is significantly greater than in other Latin American countries (Handlin, 2017; Morgan, 2018, pp. 317-318).

How Institutional Polarization Harms Democracy

The differences between ideological and institutional polarization are more than just semantic. The first form of polarization around policy differences is good and healthy for democratic competition. The second type around the importance of democratic procedures can be much more problematic and has the potential to produce significant democratic backsliding.

Furthermore, a democratic system lacking policy-based polarization is highly susceptible to becoming vulnerable to the second, more insidious form of democratic polarization. In Venezuela, the absence of substantial ideological alternatives within the established party system caused the system to lose its programmatic legitimacy among disillusioned voters. As individuals sought an alternative to address the worsening economic and social circumstances, they searched for options outside the conventional political parties. As individuals sought an alternative to address the declining economic and social circumstances, they searched for options outside the conventional political parties. Consequently, they gravitated towards a leader who pledged to deliver solutions, which included ensuring representation for those marginalized by the established system and addressing economic inequality. This approach aimed to alleviate the hardships faced by vulnerable groups, who had encountered years of declining living standards. In other words, they prioritized the achievement of substantive outcomes over the formal democratic procedures that are intended to produce them.

The emergence of this type of polarization concerning the nature of the rules of the game presents a formidable challenge to contain, and its persistence poses a significant threat to the sustainability of democratic institutions and practices. The Venezuelan experience can shed light on some of the dire consequences that can arise from this situation.

In Venezuela, institutional polarization clearly **preceded** the country's slide into authoritarianism. I propose two primary mechanisms through which institutional polarization can lead to democratic erosion.

First, institutional polarization pits the procedures of democracy against the substantive goals of democracy —instead of seeing these as complementary, institutional polarization positions them as being in competition with each other. Consequently, politicians and ordinary voters are faced with a trade-off between preserving democratic institutions but not finding much by way of substantive representation or allowing democratic procedures to be compromised but gaining the substantive outcomes they care about. Once democracy is seen as being orthogonal to the substantive interests of the majority of ordinary citizens who should presumably benefit from democratic practices, it becomes increasingly difficult to sustain abstract investment in the regime, which paves the way for democratic erosion.

Second, institutional polarization means that the democratic rules of the game are no longer a given but rather they are the subject of political debate. When this occurs, politicians, activists, voters, even international actors become willing to use extra-institutional and non-democratic strategies to hold onto or regain power and to accomplish their substantive goals. We have seen this dynamic in Venezuela where both sides of the *chavista*-opposition divide have increasingly resorted to tactics that are indisputably undemocratic. Of course, *chavismo* controls the levers of state power so their strategies have involved more overt violations not only of liberal democratic rules but also of fundamental political and even human rights —censoring the press, manipulating elections, circumventing policymaking institutions, imprisoning opponents, etc. However, the opposition has not consistently shied away from approaches that neglect domestic democratic institutions like investing in political parties and have instead resorted to pursuing extra-institutional solutions like international pressure campaigns or even direct intervention.

The dynamics inherent in both of these processes suggest that under conditions of institutional polarization strengthening or protecting democratic institutions is often seen as secondary to other more immediate political goals having to do with control of state power or the pursuit of certain substantive interests. When this happens there are no guardians of democracy, and the regime is highly likely to erode (Arbatli & Rosenberg, 2021; Svolik, 2019). This is precisely what happened in Venezuela. Moreover, once the regime does erode, reinstating democracy under conditions of institutional polarization is quite challenging because few political actors are prioritizing democratic logics of contestation as a means for resolving social and political conflict.

In summary, it is hasty to equate all forms of polarization. Representative democracy requires some level of policy-based polarization to function effectively. Without it, representation and electoral competition lose their substance. However, we must distinguish this valuable type of polarization from the harmful polarization concerning the value of democratic institutions which hinders the maintenance and restoration of democracy.

Conclusion

Party system collapse and the representational crisis that causes it puts democracy at risk. The representational crisis prompts individuals to doubt democracy's capability to fulfill their substantive concerns. Subsequently, the party system's breakdown contributes to the deinstitutionalization of democracy, providing an opportunity for successors who promise to address the representational shortcomings of the old parties, but who may lack a firm commitment to democratic processes and institutions. Instead of parties with differing ideologies providing substantive representation, institutional polarization regarding the worth of representative democracy and its fundamental establishments becomes established. These procedures are visible in the progressive decline and eventual collapse of Venezuelan democracy during the past 25 years.

The Venezuelan experience also serves as a warning regarding procedures of institutional polarization and the erosion of democracy throughout the hemisphere. Recent developments in Chile indicate a growing democratic fragility, which stems from various sources such as representational shortcomings, party system deterioration, and institutional polarization. The traditional party system that was once highly institutionalized and offered some programmatic diversity has lost its legitimacy due to the lack of meaningful policy differentiation. The political establishment strives to maintain its grip on power by uniting against external interference. This echoes the situation in 1990s Venezuela and is currently resonating in Chile (Morgan & Meléndez, 2017). The nation has witnessed a decline in the established democratic order's competitive patterns and witnessed the emergence of anti-establishment figures advocating for undemocratic practices. Democracy in Chile is at a critical juncture. While traditional ideological divisions have reduced, opinions on the importance and function of democracy have become increasingly polarized.

Even in the United States, where some important policy differences between the two major parties remain, particularly on non-economic or cultural issues, the leaders of both parties tend to support policies that protect the economic interests of elites (Kelly, 2020; Witko *et al*., 2021). In this context, institutional polarization is escalating, and the two parties are increasingly divided over the legitimacy and utility of core democratic institutions like elections, parties, and even the Legislative. These kinds of dynamics create openings for anti-democratic actors and have real potential to erode democracy (Arbatli & Rosenberg, 2021; Carothers & O'Donohue, 2019; McCoy & Somer, 2021).

All too often, the procedures of representative democracy fail to deliver on the substantive interests of ordinary citizens. Such failures ultimately erode democratic institutions and provoke skepticism towards the legitimacy and functionality of democracy (Morgan & Kelly, 2021). Consequently, democracy's credibility is compromised, and individuals who are excluded from the system turn to less-than-democratic alternatives. At the same time, those who benefit from a limited democratic system often resist substantive reforms that could ultimately enhance democracy and increase its legitimacy among marginalized communities. This blend of deep-seated resistance along with simmering discontent is conducive to the ruptures that

have surfaced throughout the region, starting with Venezuela towards the end of the 20th century and persisting through the growing tide of democratic erosion.

In this way, while proponents of democracy frequently prioritize institutions and procedures, which are unquestionably crucial, supporters of democracy must also strive for the development of inclusive social and political structures that engender widespread legitimacy for democratic institutions and procedures. When such circumstances prevail, citizen attitudes and behavior tend to align with democratic principles, reducing the likelihood of polarization regarding democracy, as opposed to policy. This in turn provides a better habitat for a stable and deeply rooted democratic system. Conversely, when democratic procedures fall short, citizens understandably become more ambivalent about the actual worth of democracy. Institutional polarization becomes more likely in such cases, placing democratic systems at risk.

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"Chávez Did Not Come from Mars": An Overview of De-democratization Processes in Venezuela from a Multi-Faceted Perspective

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Introduction

In 2018, Tomás Straka, the historian and essayist heading the Instituto de Investigaciones Históricas "Hermann González Oropeza, sj", at the Universidad Católica Andrés Bello (UCAB) and member of Venezuela's National Academy of History (Academia Nacional de la Historia), initiated a project. He and several researchers examined the political and historical process prior to the arrival of *Chavismo* to power. This initiative became known as an approach to the de-democratization

of Venezuela. Several press articles, a book by Andrés Cañizález, and this study originated in those academic exchanges. In a jocular tone, Straka would remark: "It is not that Hugo Chávez just came from the planet Mars". Most Venezuelans did not come to espouse his proposals and discourse by magic.

Nevertheless, in the minds of people in academic, political, and media circles in the West, Venezuela was a pampered tropical paradise exporter of oil, beauty queens, and soap operas. Above all, to many in the English-speaking world, *Chavismo* seems like an unexplained accident, as if it were the script of a Hollywood movie. This review seeks to demystify this vision by illustrating since when, for how long, how and why processes have emerged that have gradually dismantled democracy in this Caribbean country.

In reality, the rise of Chávez to power, on February 2, 1999, is the result of long years in which an anti-democratic, anti-systemic sentiment was brewing in the hearts of Venezuelans.

Venezuela has sailed ahead or against the high or low tides of democracy. It began its own in 1958 when dictatorships were rampant in the continent; until the mid-1970s, it was a favorable case study of Rostow's modernization theories in the West during the Cold War; its fight against insurgency was successfully swift; it achieved remarkable social, economic, health, and infrastructure achievements; it consolidated a middle class. It achieved all these accomplishments before many of its neighbors could.

However, at the turn of the 21st century, the economic model entered a dead end; poverty doubled; institutions began to erode; corruption scandals, riots and coups d'état resurfaced. Consequently, in 1998 society voted overwhelmingly for an anti-establishment candidate in successive elections, applauded his policies against the previous order and was seduced by his narrative. In 2007, it went further and officially adopted Bolivarian socialism, far more radical than any other modality of the Pink Tide[1] in Latin America nuanced. Another oil boom financed a wave of nationalization and regulation amidst an organic increase in the purchasing power of the poorest between 2004 and 2011. Soon after, it plunged into a crisis similar to the real socialisms of the 1980s: Bankruptcy, the largest recession in recorded history, and the second-

largest external displacement crisis in the world (UNHCR, 2022).

In this research, we will analyze the process that led, in 1998, a majority of voters to elect the man who promised to change the game and overturn the established order. What happened in pre-Chávez Venezuela to create the conditions for the democratic rise of *Chavismo* to power? We will also reflect on the exercise of power by *Chavismo*. As we move further into the 21st century, Venezuela moves further backwards; the world's indicators and ratings for democracy, human rights, and activities of non-governmental organizations (NGOs) placed the country at the bottom of their lists (Chapultepec Index, 2022; OHCHR, 2023, January 23). In general, Venezuela now appears alongside war-torn nations such as Yemen, Sudan, or Syria, among the worst rating for democracy or economy, with a painful record of repression (OHCHR, 2022, September 20).

In this regard, de-democratization has a double face in Venezuela's recent history. In one aspect, it may comprise an approach to contextualize and explain what happened, particularly in the fifteen years preceding Chávez's electoral victory in December 1998.

For that seminal 2018 research, we initially relied on Steven Levitsky and Daniel Ziblatt (2018), Yanina Welp (2020), as well as Kapstein and Converse (2008).

Levitsky and Ziblatt, authors of *How Democracies Die*, review how the democratic system is eroded from within, and corroded by authoritarian characters who rise to power playing by the rules of the democratic game. This dismantling of democracy in our country is what has begun to be called the process of de-democratization of Venezuela in a profuse academic production.

Drawing on examples such as Venezuela, Poland, and Hungary, Levitsky and Ziblatt claim that democracies today are no longer attacked by military coups and other violent methods of usurpation of power. On the contrary, since the end of the Cold War, some governments emerging from elections have disrupted democracies. They are destroyed from within. A central issue in their explanation is the emergence of "extremist demagogues" in democratic systems and the kind of response that the system itself and its elites give to these characters.

They recurrently refer to two South American cases which cannot be any further from each other in ideological terms: Hugo Chávez in Venezuela and Alberto Fujimori in Peru. In essence, the above authors posit that elites failed. According to them, in both Peru and Venezuela there was "a lethal combination of ambition, fear and miscalculation". This "conspired to lead them to make the same fateful mistake: Eagerly handing over the keys of power to a burgeoning autocrat".

Our criticism of Levitsky and Ziblatt's assessment is that they divide the world into good guys and bad guys. The former are represented by those political parties in their role as guardians of democracy to "keep authoritarian people in check"; these are obviously the bad guys, authoritarian people with a psychological propensity to accumulate power and bend the rules.

In the American scholars' bestseller, four indicators are proposed to identify which profile of politician is prone to destroy a democratic system: a) Rejection of (or weak commitment to) the democratic rules of the game; b) denial of the legitimacy of political opponents; c) toleration or encouragement of violence, and; d) readiness to curtail civil liberties of opponents, including media.

In Levitsky and Ziblatt's book, there is little questioning of the elites, not only political but also intellectual, for their role in preventing openness towards effective functioning of democracy, or what those in power did to make society less unequal and thereby preserve the democratic system in the long term. The basic question is what happened to those elites who did not respond to a deep-rooted dissatisfaction against the democratic system, ultimately embodied by Chávez.

However, social unrest as a factor of crises, an issue that Yanina Welp (2020) underscores by way of criticism, is eluded. Instead, the political elites are questioned for not having realized the danger embodied by such figures. In Venezuela, where the population already associated democracy with a decent standard of living before the advent of Chávez into the public scene, Welp challenges academics regarding an issue that seems to us crucial in this reading "from the south": Freedom is upheld as the supreme value, without giving similar weight to the quality of life translated into meeting such needs as health and food.

With their own view, Kapstein and Converse draw a clear yellow line to identify eventual enemies of democracy: Those leaders who, once in power, focus on reversing the constitutional norms in force. To reach this conclusion, the authors rely on historical evidence. Another reflection of these authors revolves around polarization as a distinctive feature of demagogic leaders who seek to undermine democratic consensus. However, the role of citizens is not addressed. They merely limit themselves to arguing that more unequal countries, nations with greater social gaps, are more likely to experience an erosion or even a reversal in their democratic system.

This review will detail further conceptual contributions found in recent years, key weaknesses from the model of democratic system adopted in 1958 which gave way to the advent of *Chavismo*, economic populism in the form of redistribution of wealth with its past and current inequality as a decisive factor, the turning point of pragmatism in party politics, the authoritarian traits ranging from "participatory democracy" to the Communal State, the role of the opposition, as well as prior and present issues regarding industrialization and poverty. Our reflection on the topics above is non-linear, going back and forth in the timeline of events as a means to understand their nature and impact on the de-democratization processes being experienced by Venezuela from the last two decades of the 20th century to these first two of the 21st century. This is the historical frame we have chosen for our analysis as it encompasses a generation before Chávez's rise to power and a generation after that event.

Analysis Enriched by Conceptual Diversity

Two of the most obvious signs of de-democratization in Venezuela are, on the one hand, the complex humanitarian crisis in the form of the second most massive emigration worldwide since 2017 and, on the other hand, the existence of two rules since the interim presidency from 2019 to 2022.

Let us illustrate this in the form of the news-cycle mindset in English-speaking countries. It was not an interruption of regular programming. It was not that in 1998 we were happy and, a year later, everything

changed for the worse. It is necessary to dispassionately study the gradual and so far unstoppable process of how *Chavismo* dismantled the democratic model to perpetuate itself in power.

We propose to explore the change of realities in Venezuelan life. We should see de-democratization, the name we give to these changes, as a process political in nature along a historical framework as defined in the Introduction.

The terms 'democratic erosion', 'autocratization' and 'de-democratization' address the need to name this process. We have chosen 'de-democratization' because an eroded democracy remains a democracy and autocratization points to an autocratic regime as a result. On the other hand, de-democratization in Venezuela can lead to various outcomes, because of its semi-authoritarian, autocratic, totalitarian, and even anarchic ramifications.

Seeking to solidify this research process of more than four years, we resort to the approaches below contributed by scholars from across the world to define the reality addressed in this paper:

For the Catalan political scientist, politician, and lawyer Josep Maria Vallès, de-democratization is "a dissonant word to designate a threatening reality. It describes the democratic regression that can affect political systems" (2013, December 12). This contribution of Vallès arises from his analysis of the Spanish reality.

On the other hand, let us turn to Charles Tilly (2007), late American historian and political scientist, the scholar who coined the term in his book *Democracy*, and who defines it as follows: "On the whole, de-democratization occurs in the course of rulers' and elites' responses to what they experience as regime crises, most obviously represented by threats to their own power". He characterizes this phenomenon and provides indicators to observe in a political system, the context being the chapter dedicated to India.

From Mexico, the professor and political researcher Ángel Sermeño (2021), holds that de-democratization:

> [...] translates into a widening extent of arbitrary and illegal traits in the performance of government bodies, as well as in the weakening of

> the representative constitutional framework regulating the legitimate spheres of decision making for each one of the (executive, legislative, and judicial) branches of political power. (Sermeño, 2021)

To add the optics of a scholar from the Middle East with an academic life in Europe, we have relied on Behrouz Alikhani (2017). This Germany-based Iranian political scientist and professor warns that "processes of de-democratization can gain strength if the power resources of a society are increasingly monopolized by a specific 'sector' and institution or by a group of influential individuals." He makes these reflections in the context of the United States.

With this broad conceptual toolkit, we seek to review different countries and the same phenomenon, also occurred in Venezuela, one of democratic regression affecting political systems, noted by Vallès, in which power resources are increasingly monopolized by influential sectors or individuals, according to Alikhani. On the other hand, we examine the responses of rulers and elites in our country to the crisis of seeing their own power threatened, as noted by Tilly. Likewise, we will observe the symptoms of this de-democratization in the extent of arbitrary and illegal traits, as identified by Sermeño, among public officials and the weakening of the framework governing the branches of public power.

In fact, with the change from one constitution (1961) to another (1999), from the three classic divisions (judicial, legislative, and executive), to five (executive, legislative, judicial, electoral, and citizen), we can witness such weakening. This did not bring about an improvement, but rather the opposite, in the democratic and institutional performance of the Venezuelan State.

We have decided to avoid the 'breaking news perspective' with headlines of events known by Venezuelans as *El Viernes Negro*[2], *El Caracazo*[3], *La Constituyente*[4], the Recall Referendum 2004, the *guarimbas*[5], or others. Conversely, we pursue an analysis of the processes and factors listed in the Introduction.

The Democracy of *Puntofijismo* Gives Way to a Messianic Hyper-Leadership

Although the timeline of our analysis spans from the 1980s to the 2020s, it is necessary to recall the origin of the political model prior to *Chavismo*. This was one of compromise of elites formalized in the Puntofijo Pact (*Puntofijismo*), known as such because it was signed in the homonymous house of Christian Democrat leader Rafael Caldera.

This pact between the political elites was signed by the leaders of these parties: Independent Electoral Political Organization Committee (Comité de Organización Política Electoral Independiente, COPEI – center-right – Rafael Caldera, Lorenzo Fernández, Pedro del Corral), Democratic Action (Acción Democrática, AD – center-left – Rómulo Betancourt, Gonzalo Barrios, and Raúl Leoni) and Democratic Republican Union, (Unión Republicana Democrática, URD – left – Jóvito Villalba, Ignacio Arcaya, and Manuel López Rivas).

The need for a revision and a sort of re-foundation of the system, which was beginning to be raised among scholars and analysts of the time, did not resonate with those in power. As Jesuit Arturo Sosa analyzed in January 1978, the Venezuelan democratic system had been leveraged by the oil economy. The 1958 model, based on a pact of elites, was not only political, but also included the private business sector. The population perceived that in democracy it was possible to get ahead, to rise socially. Along with the modernization that Venezuela experienced in the first 15 years of democracy, a middle class was also consolidated.

The oil boom that coincided with Carlos Andres Perez's first term in the presidential office (1974-1979) caused the system to collapse and encouraged consumerism aspirations among Venezuelans. They expected to reach levels of prosperity not supported by their effort or productivity. Already in the final stretch of this administration known as Pérez I, "an immense social struggle for the sustainability of the model" began to be experienced according to Sosa (1978).

In the popular imagination, the democratic model was not only a system of freedoms and political rights, but was also identified with economic welfare and possibilities of social mobility. Already in 1978, Social-Christian Luis Herrera Campins (COPEI) positioned his run

for president, to which he acceded for the period 1979-1984, with the incisive question: "¿Y dónde están los reales?" ("And where are the bucks?") It was not trivial to wonder where the wealth product of the oil boom since 1974 had gone.

The fact that the popular vote, after the intoxication of petrodollars during Pérez I, benefited a political adversary like Herrera Campins, who wondered where the wealth had gone, reveals the limiting dynamics that were experienced and that deeply eroded the credibility of democracy. Poverty grew amid a higher oil revenue; corruption became rampant as public budgets quadrupled. Consequently, this combination, along with other factors, helped social unrest begin to brew, a de-democratizing factor according to Welp (2020).

According to an editorial in *SIC* magazine (Centro Gumilla, 1978), the Perez I administration was regarded as a last opportunity to re-establish democracy, to renew the link between the population and the political class – a looming crisis not responded by the elite, in an early instance of Tilly's view (2007). After the most welcomed nationalizations of iron and oil, "the deceptive words, the outrageous dealings, a greater concentration of wealth insulting a nation" were pointed out as very negative elements of Pérez's administration. *SIC* foresaw that an electoral victory by Luis Herrera Campins would be the product of "the disasters of the government" of Perez I, as it finally occurred at the polls.

For Michael Penfold, author of the essay "Adiós al Puntofijismo" (["Farewell to *Puntofijismo*"], 2000), two factors explain the failure of the model. On the one hand, the effect of the drop in oil income into the Treasury, which exacerbated many of the initial contradictions within this tropical model of the democratic system; on the other hand, the increase in electoral competition due to changes in the voting system and the start of direct mayoral and gubernatorial elections.

The political pact in Venezuela was successful to the extent that it had resources for its redistributive scheme. When this mechanism ceased to work due to the fall of oil revenue, a process of delegitimization ultimately found its way into the electoral ballot box, boosting an outsider to power – as was Chávez in 1998. Regarding the greater electoral competitiveness at the local level – apparently an advancement

for democracy –, this was not supported by a strengthened institutional framework, but quite the contrary.

Towards the end of the 20th Century, *Puntofijismo*, primarily became a moniker of that compromise and search for consensus which was the germ of Venezuelan democracy established in 1958. The popular vote had undoubtedly punished those who had governed under the model. Moreover, it could be envisioned that this majority support would fall on the shoulders of a leader who was then difficult to read. Furthermore, it was not clear where he would lead the country, only that we were on the verge of a change of era in the nation.

Luis Gómez Calcaño (1999) identifies early on three traits in the nascent exercise of power by *Chavismo* that, in his opinion, would undermine a true institutional reconstruction in Venezuela. From the outset, it was heading towards a repetition of the failed schemes of the 1958-1998 period. For this scholar linked to the Center for Development Studies (Centro de Estudios para el Desarrollo, CENDES), weak government institutions were the key to explain what was beginning to brew in the country during 1999, or in Vallès's words, "the democratic regression that can affect political systems" (2013).

A first identified was Chávez's messianism, which ended up supplanting a failed institutional model (Gómez Calcaño, quoted by Prieto, 2020, June 7). The person above the institutions was a common practice at that time. It was thought that placing fresh officials, "committed to the people" in key institutional positions would be enough to put an end to corruption.

Chavismo, marked by a messianic leadership, did not create a modern party either. In 1999, there was the V Republic Movement (Movimiento Quinta República, MVR, precursor of the current ruling party), an outfit established a year before under pressure from the electoral authorities so that Chávez could formally register his presidential bid: A party established under the leader's whims, a denial and annihilation of the institutional framework in practical terms, in other words under an "extreme demagogue" (Levitsky & Ziblatt, 2018). *Chavismo*'s inaugural administration – and this was one of the primary reasons that catapulted him to an electoral victory – found democratic institutions deeply discredited.

It was the year 2000: President Hugo Chávez was in his first months in office, and polls revealed that his approval ratings were higher than votes he had obtained during the election. It was a time of reflection and forecast. On the one hand, the failure of the 1958 model was assessed in different circles and with this, a cycle was closing in Venezuela. On the other hand, there were many concerns about the new cycle: The so-called 'Bolivarian Revolution'.

Francisco José Virtuoso (2000) pointed out that Chávez symbolized "the Bolivarian civic republicanism that is part of the ideological identity of the Venezuelan Armed Forces". What were good intentions, aligned with popular longings, did not hide from Virtuoso elements that were extremely unsettling already during those first months of his administration: The inexistence of a national project in which the aspirations of Venezuelans and the good intentions of the president, his government, and his political allies would materialize, the absence of teamwork among high-ranking government officials, the continuous reliance upon (retired and active) military and upon military institutions to fill political vacancies and manage social or development programs, and the lack of expertise of most of the officials in the exercise of the positions entrusted to them.

The notable institutional weakness evident across the country in 1998-1999 had as a response messianism and personalism. With his powerful public discourse, Chávez seemed to be the only answer to a multitude of problems. The opportunity to re-institutionalize the country was lost. On the contrary, the new power scheme took advantage of that moment, but used it to mold the institutions according to the dictates of the political messiah.

In Gómez Calcaño's opinion, another feature was the deepening of a populist subculture. It was evident to this scholar that the direct relationship between citizens and the head of state was reaching very high levels. This non-institutional relationship was not intended to address the issues and propose eventual solutions to the crisis in Venezuela. Instead, people merely reached out to the new power holder with letters and slips of paper to request employment, financial aid, or health care. *Chavismo* blurred the institutional mediation between citizens and the presidential office. With this, the opportunity to rebuild the fabric of Venezuelan state agencies was missed, in a

textbook example of the weakening of the representative constitutional framework (Sermeño, 2021).

Institutional weakness, inherited by *Chavismo* and subsequently exacerbated by Chávez himself, showed a last feature: The non-existence of modern political parties in Venezuela. At the beginning of *Chavismo*, the two flagship parties of the 1958-1998 era, AD and COPEI, were a sort of caricature of the groups that decades earlier had spearheaded the modernization of the country. Their debacle was decisive in the institutional erosion experienced in Venezuela.

Redistribution of Oil Wealth: The Other Face of a Failed Model

More often than desired, primarily political-institutional variables have been reviewed to explain the reasons for the collapse of the Venezuelan democratic system. However, in order to understand the de-democratization in Venezuela, we must look at the failed model that had its central expression in the financing of economic and economic growth and social welfare by means of fiscal proceedings from hydrocarbons (oil revenue), that is, the redistribution of oil wealth, or *rentismo* in academic literature in Spanish.

In this regard, economist Víctor Álvarez (1989), noted:

> We could say that the manifest weakness of the domestic productive infrastructure, the intensification of the inflationary process, the dramatic levels of unemployment and underemployment, the growing deficit in the balance of payments, the liquidation of international reserves, the unstoppable deterioration of the bolívar against the dollar, the negative interest rates discouraging savings, and the persistent fiscal deficit are the main challenges that make up the critical picture of the Venezuelan economy. (Álvarez, 1989)

This quote does not correspond to the first three years of Nicolás Maduro's administration (2013-2016), immediately prior to the hyperinflationary spiral in Venezuela. Álvarez, also a minister during the government of Hugo Chávez, wrote it when making an appraisal of the economic legacy of Jaime Lusinchi's administration (1984-1989).

Upon noticing such parallelisms between the handling of the economy in the final stages of *Puntofijismo* and the rule under *Chavismo*, Venezuela resembles a dog turning around to bite its own tail.

As Asdrúbal Oliveros and Armando Gagliardi (2017, May 1) have recalled, Venezuela's political class had already received a strong warning on *Viernes Negro*, during the government of Luis Herrera Campins, regarding the unsustainability of the model. However, in hindsight, there was neither the ability nor the will to change the way in which what was then called "State capitalism" was being managed. According to these analysts, the administration of the next head of state, Jaime Lusinchi, had a litmus test to turn the economic model around in 1986. That year, the price of oil fell abruptly from USD 25.94 per barrel to USD 13.31 per barrel, a drop of 48.7% in one single year.

The foundation of the model was wrong in the 1980s and is still wrong in the 21st century: It was – and is – based on the international price of oil, a variable that evidently cannot be controlled. Indeed, the Venezuelan history of the last decades makes clear the cyclical nature of the international price of crude oil. High prices do not last forever. Only that our rulers, yesterday and today, seem to believe so.

Another cause noted by Álvarez regarding Lusinchi's administration, which is very similar to the economic practices of Nicolás Maduro's government in its first three years, was the dutiful compliance with the foreign debt payments. Rather than defaulting, for Álvarez, a sharp drop in revenues should have as a response a renegotiation given the country's diminishing capacity to pay.

An issue not clearly addressed by this economist, nor by Oliveros and Gagliardi in their assessment of the Lusinchi period, is the political decision behind every economic stance when exercising power in a country like Venezuela. Times of lean cows are perceived as transitory, as all those who have held the presidential office since the boom of the 1970s onwards bet on a rise in international crude oil prices as the main leverage of their economic policies.

Cycles of expansion of public spending, followed by economic recession, were repeated in Venezuela between the post-oil boom (1980) and the rise of *Chavismo* to power, practically at the dawn of

the 21st century. The national leadership did not manage to remove the country from this perverse logic. Another shower of manna, another oil boom, was always expected. In this dynamic of high expectations and deep recessions, Venezuelan society was also immersed and more deeply impoverished.

Economist Luis Zambrano Sequín (1998) briefly described what had been a constant in terms of economic policy in Venezuela in the last decades of the 20th century: Episodes of huge booms followed by deeply recessive phases typical of the Venezuelan economy, given its reliance on oil and its already chronic institutional weakness (Sermeño 2021). It is not unwarranted to describe Venezuela as one of the most volatile countries in the world.

One of the harmful effects of the failed model of redistribution of oil wealth on democracy is more poverty and wider inequality. Against the backdrop of a deep process of de-democratization in Venezuela, the debt of representative democracy regarding social issues opened the floodgates to a model built on a socialist discourse, but with similar results of poverty and deeper inequalities. Again, past and present elites give answers to crises that undermine democracy (Tilly, 2007).

At the beginning of Hugo Chávez's government, the late Venezuelan psychologist, academic, diplomat, and politician Mercedes Pulido de Briceño (1999) made a social assessment that proved to be prophetic: "Growing inequality fragments society and fosters resentment". This is how millions of Venezuelans have lived, especially in the recent years of the Bolivarian Revolution.

It must not be forgotten that Chávez acceded to power on a narrative of resentment. Mercedes Pulido held that Venezuela had been experiencing years of impoverishment. "Poverty, which in 1982 affected 27% of the population, at the beginning of 1998, 68.7% of Venezuelans did not have enough income to meet their basic food and other needs [...]".

The crisis of the model of redistribution of oil wealth resulted in long years of economic and social decline. That was the breeding ground for the unrest among Venezuelans that Chávez capitalized on as a candidate. In the 1998 social outlook described by Pulido de Briceño,

the scarce development had fundamentally affected the middle class; education lost momentum as a means of social mobility; heads of household with higher education and in poverty had gone from 1.5% in 1980 to 4.7% in 1997.

Such figures may pale in comparison to the situation triggered by the accelerated impoverishment as of 2014-2015. To the poverty and inequality exacerbated by *Chavismo* and its misguided hyperregulation and expropriation policies, must be added the opacity and lack of official data, typical of the Maduro administration. This is an example of the widening extent of arbitrary and illegal traits in the performance of government bodies, as well as the weakening of the framework regulating its branches (Sermeño, 2021).

The point of No Return: Nosedive into Pragmatism

A year that made clear the depletion of traditional political class was 1998. It also made very evident the diminished ability of the elite to reinvent itself and respond to growing social demands for change.

Francisco José Virtuoso (1998) reviewed what was a political game to reach or cling to power, with no connection to the demands of society. Virtuoso criticized the excessive pragmatism that had been the constant throughout a presidential run in which the traditional party campaigns seemed out of the fuel of emotion from and connection with the masses.

The Radical Cause party (La Causa R[adical] – labor left) supported former Miss Universe and Mayor of Chacao, an upper-middle class borough of Caracas, Irene Sáez, so did COPEI. The Movement Towards Socialism (Movimiento al Socialismo, MAS – center-left), against the guidelines of its founders Teodoro Petkoff and Pompeyo Márquez, joined the *chiripero*[6] of early *Chavismo*. Meanwhile, AD stood behind the strongman who controlled the party rank and file but who lacked any charisma: Luis Alfaro Ucero. Already in the final stretch of the campaign, Venezuelans witnessed more chess moves, since COPEI and AD would end up supporting the very successful Carabobo State Governor Enrique Salas Römer, backed by his on Project Venezuela

(Proyecto Venezuela) party. All this political juggling was done in an ostensibly improvised fashion.

Amid the campaign, Virtuoso questioned:

> Regardless of the strengths and weaknesses of the current group of candidates for the Presidency of the Republic, what is surprising is that the fundamental reason why this or that political organization selects a member of such group is a utilitarian and pragmatic calculation for electoral gain, in disregard of ideological tradition, the identification between candidate and national project, or even the belonging to the organization. The only thing that seems to prevail as an underlying reason is the bottom line of what the polls that the mass media are in charge of publicizing […]. (Virtuoso, 1998)

Since the mid-1980s, the country had been undergoing a gradual process of de-democratization amid which the political class was unable to reinvent itself. It is a classic example, in the perspective of Charles Tilly (2007), of how rulers and elites experience a regime crisis due to threats to their power posed by the environment.

All this accelerated process of institutional implosion did not give way to self-criticism and soul searching within the parties. In an ostensible absurdity, a few days before the elections, AD expelled Alfaro Ucero from its ranks because he refused to decline his presidential bid in favor of Salas Römer. It was the last and desperate move of pragmatism.

A Popular Democracy: Top-down Authoritarianism under the Guise of "Participatory Democracy".

Amid the effervescence generated by Hugo Chávez and his proposals among the energized masses to practically overhaul the country during 1999, a *Constituyente* (Constitutional Convention) initiative was gaining momentum. We were facing one of the main promises of *Chavismo*'s electoral platform.

Hugo Chávez was just sworn in as president on February 2 that year. As Margarita López Maya and Luis Lander (2000) pointed out at the time, his accession to the presidential office was consolidated with 3.6 million votes (36% abstention). Meanwhile, the approval for drafting new constitution obtained 3.3 million votes and an abstention slightly

higher than 55%. The authors questioned the possibility of Chávez's popularity to promote a radical reform of the democratic system.

Before the referendum for the approval of a new constitution in December 1999, Jesuit theologian Pedro Trigo (1999) warned about the danger of building a new democratic model "from above". Early *Chavismo* insisted on doing away with "representative democracy", since it served the elites, and advocated the need for a "participatory democracy". In truth, what happened with the repeal of the 1958 constitution was the acceleration of a process of de-democratization. The shortcomings of the 1958-1998 democratic model received in response an exacerbation of its ills, in an example of reversing the constitutional norms in force, a trait of enemies of democracy according to Kapstein and Converse (2008).

For Trigo, the constituent conversation posed the great risk that the draft text would end up being imposed "from above", from the State; for analysts such as López Maya and Lander, the challenge was to separate Chávez's popularity from social and participation mechanisms conducive to a democratic change. In truth, what happened was that Chávez ended up saturating the *Constituyente* conversation. Consequently, in many respects, a constitution was tailor-made to his wishes and expectations. The highest law of the land approved in 1999 was not the product of a genuinely participative process. It was not drafted "from below", from among the people and their social, community, and grassroots organizations. After all, "popular democracy" is a term that emerged from the real socialism of Eastern Europe.

Trigo noted: "The people were called upon to participate in conducting what they had not designed, managed, or controlled. In the name of the people, the people were denied as a subject, they were replaced."

In his view:

> The people cannot be mere recipients of handouts or mere enforcers of what they do not conceive of, manage, or control. If the ruler limits himself to calling on the people to collaborate with him, if non-government organizations limit themselves to framing the people from paradigms alien to them, the people will never be able to exercise their citizenship. (Trigo, 1999)

That which was born imposed from above enjoyed some early years that several analysts considered positive in terms of popular participation in different realms. The re-election of Chávez in 2006, as noted by López Maya (2011), and his hellbent efforts to impose the model of the "21st Century Socialism", fossilized fledgling participation initiatives. From then on, "popular power" came to be understood as a denomination for the State, a motto co-opted by a *Chavismo* which took over the institutions and by Chávez, with a clear intent of perpetuating himself in power.

The Role of the Opposition

Just as *Chavismo* became an authoritarian power with hegemonic pretensions, for a long time, the opposition has been wandering in the wilderness to articulate a democratic alternative with a coherent strategy. The de-democratization, prior to *Chavismo* and catalyzed by it, must also be understood as the failure of that much sought after democratic alternative in these years of the 21st century.

Critical reflections on the opposition to *Chavismo* have been a recurring element when studying the nature of the regime inaugurated in February 1999, once Hugo Chávez took office. Even from its inception, the authoritarian project embodied by *Chavismo* had as a correlate failed opposition actions or strategies that paved the way in the former's avidity to seize all power in Venezuela.

Francisco José Virtuoso (2004) raised the stakes for thinking of an alternative to *Chavismo*. This author stated that, "for now" (at the time he wrote), it was not accurate to call Chávez's government a dictatorship since, although its authoritarian traits were noticeable – or since it was dismantling democracy from within per Levitsky and Ziblatt (2018), there were spaces for political and institutional action by the democratic forces that were then-adversaries of the regime.

Virtuoso reviewed Venezuela's political landscape in the months prior to the recall referendum on the president scheduled for August 2004. Opposition factors were grouped in the so-called Democratic Coordinator (Coordinadora Democrática, CD); but this coalition

already looked weakened once Chávez was reinstated in office after the failed coup d'état of April 2002 and the failed oil strike (December 2002 - January 2003).

However, the opposition had institutional muscle: It controlled an important number of gubernatorial and mayoral offices; it exercised checks and balances at the National Assembly (Legislative, unicameral; per the Constitution of 1999); and the Supreme Court justices ruled independently, without the need to be aligned with the *Chavista* power.

Regarding the challenges to be faced by the Venezuelan opposition, Virtuoso identified three: 1) to formulate a vision of the country that would be understood by *Chavistas* and non-*Chavistas*, in the form of in means and ends with real possibilities of implementation; 2) to build a political space of unity, which should be translated into a single political strategy; and 3) to integrate the Venezuelan people, who should feel called and invited to participate in this alternative project of society.

In the Jesuit's opinion, the opposition had repeated a strategic error by focusing exclusively on the thesis of "removing Chávez", without considering the key factors that brought *Chavismo* to power: "The opposition has ignored the task of doing politics, conquering spaces, reaching agreements and compromise, rebuilding the parties". In his opinion, the opposition had fallen into the polarization game, a strategy proposed by *Chavismo* for its own benefit.

Chavismo's discourse basically appealed to a dichotomic logic, to divide society. Chávez built antagonistic issues to face the people against the oligarchy and the nation against imperialism in the national narrative.

Nelly Arenas (2005) indicated that, throughout his political activity, Chávez had developed a narrative essentially marked by his anti-elitism against political parties, the Roman Catholic Church, the media, business, and longtime unions. "Rotten Ivory Towers" ("Cúpulas Podridas") was the moniker used by Chávez since the days of the electoral campaign to call the representatives of the old establishment.

On the other hand, in those days, Professor María Gabriela Cuevas (2004) also reflected on the situation. This UCAB researcher was then analyzing the human rights at stake from the perspective of the recall

referendum. Viewed from the perspective described by Levitsky and Ziblatt (2018), he was ready to curtail civil liberties of opponents, including the media.

Chávez understood the referendum, not in the terms proposed as a right of citizens to recall the mandate of a ruler, but quite the opposite: Consolidating his power. We should remind that, during the year in which the referendum was postponed, his government launched the social health program aimed at underprivileged communities named Misión Barrio Adentro (Inner City Mission). Consequently, as shown by surveys of the time, this initiative contributed to raise his approval ratings again, a factor that contributed to seal his continuity in office.

The possibility of turning to the ballot box to recall the presidential mandate of Hugo Chávez or, years later, of Nicolás Maduro, would face a series of stall tactics and hurdles. The first referendum was only possible to the extent that there was international mediation, with a prominent role of the Organization of American States (OAS) and the Carter Center. *Chavismo* tampered with the process to postpone it as long as possible, a factor that played in its favor. The latter did not make it past the calling stage.

These precedents led the researcher to argue that there was a violation of the right to political participation by setting conditions and requirements additional to those provided for by the 1999 constitution. Since then, the mechanism that would serve to make Venezuela more democratic, the recall referendum, has not been implemented again.

Although acronyms, alliances, increasing or decreasing government offices held, the twists and turns in the opposition wilderness have continued to repeat themselves: The CD was succeeded by the Democratic Unity Roundtable (Mesa de la Unidad Democrática, MUD); this coalition achieved a landslide majority in the National Assembly during the 2015 parliamentary elections; it subsequently lost momentum after infighting; from the remains of the MUD, the opposition coalition was re-founded as the Unitary Platform (Plataforma Unitaria) in 2021; from this same opposition-controlled Legislative emerged the Interim Presidency held by House Speaker Juan Guaidó since January 2019, dissolved by the opponents themselves by late 2022 (Jiménez, 2023, March 28).

Upon reading the above paragraph, it seems like a series of flashbacks to 2004. Some elements of analysis valid that year seem to be fully relevant almost twenty years later. Seen from Alikhani's point of view, the power-monopolizing practices of the current regime hinder the performance of the opposition, at the same time self-sabotaged by its deep-seated de-democratizing instincts and its condition of previous elite – or yet unconsolidated elite – in its responses to crises, according to Tilly (2007).

The Communal State: A Non-Democratic Response from *Chavismo* in Disregard of Industrialization and Social Issues

In a departure from the tradition favoring civil institutions that prevailed in the country aptly associated with the democratic model of 1958, Venezuelans made a bid for the *caudillo* (strongman) figure embodied by Chávez. Tomás Straka (2019, November 4) ascribes this twist in the thesis of Democratic Caesarism, which has had so many interpretations since it became known. "We ended the 21st century surrendered to the hyper-leadership of Hugo Chávez, 'Cesar' and 'democratic' in the exact meanings given to these categories by Laureano Vallenilla Lanz", held the historian.

In December 1998, following an overwhelming electoral victory, at a time when *Chavismo* had not yet taken over the government bodies and agencies, a new stage in Venezuela's politics began. The crisis of democracy, which had been unfolding since the 1980s, ended up receiving as a response the "medicine" that would end up exacerbating problems. *Chavismo* ended up being a non-democratic response to the process of de-democratization that was already underway at the turn of the century in Venezuela.

By the end of the 2000s, attempts to take stock of the first 10 years of *Chavismo* once it took power in Venezuela were timely. Historian Margarita López Maya (2008) identified what, in her opinion, were four vulnerabilities that, witnessed with the passage of time, indeed epitomize the weaknesses of the Bolivarian Revolution. Such flaws only intensified the erosion of democracy in the country.

As the first vulnerability, the historian pointed out "the excessive dependence on a charismatic leader and, consequently, the lack of credible collective leadership at different levels". Already back then, López Maya was concerned that the former MVR, rebranded as United Socialist Party of Venezuela (Partido Socialista Unido de Venezuela, PSUV) could consolidate itself "to act as a counterweight to the leader and promote new leadership from below".

A second vulnerability of the government consisted of the political polarization as an official strategy. In the author's opinion, this prevented the Chávez government from "broadening its support base. Polarization keeps high levels of political instability and public inefficiency due to the exclusion of middle class and professional groups".

For López Maya, the third vulnerability already evident in 2008 in the political project headed by Chávez had to do with what she named "non-democratic socialism", in her judgment reproducing "the bureaucratic-authoritarian style of the 21st Century Socialism".

The fourth issue itemized by the historian, within this non-democratic socialism, was:

> The concentration of power in the hands of the president, unchecked by the other branches of government or civil society, his discretion in the use of public resources, the pressure on public employees to be *rojos*, *rojitos*[7] not to lose their jobs, the asymmetric electoral competition between the government and those who disagree with it, and the intolerance towards political pluralism [...] weaken the legitimacy of the project. (López, 2008)

Mercedes Pulido de Briceño (1999) said that *Chavismo* moved forward slowly but surely. Although some objectives may be on hold, certain proposals, such as the Communal State, are relaunched. This model had its climax in the national conversation in 2010 and resurfaced in 2021 (Gómez, 2021, March 12).

The initial floor debate at the National Assembly regarding Law on Communal Cities (Ley de Ciudades Comunales) was completed on March 11, 2021. The tactical reason then was to skip the allocation of funds lawfully destined to municipalities, diverting them to the communes. In this way, *Chavismo* was preparing its war chest before an

imminent defeat in the mayoral and town council elections that year.

Eroding, weakening, contradicting the constitution that the Bolivarian Revolution itself enacted in 1999 seems to be a strategy sustained over time. When the constitutional letter favored its exercise of power, it was exalted; when it ceased to be useful, it has been blown up. We are before another classic example of arbitrary performance of public powers that weakens the legitimate spheres of decision making provided for in the constitution itself, according to Sermeño (2021). In this way, Chavismo has intensified the de-democratization in Venezuela.

Another instance of Venezuela's political class walking in circles then and now is the discussion on the issue of Venezuela's industrial capacity. When Venezuela undergoes a decrease in its oil revenues, the need to diversify production resurfaces in the national conversation. Different proposals in this regard cyclically end up shelved once the price of oil rebounds in the international market.

The illusion of a rich country began in 1974 with the *Gran Venezuela*[8] of the Perez I administration. The oil market boom in the 1970s significantly marked national life. Even for some thinkers and politicians, such as Ramón J. Velásquez (2005), that moment was truly the turning point in national life, one from which we did not recover in the following decades.

With oil prices above USD 100 per barrel, *Chavismo* also had its times of bounty. In 2006, when Chávez was reelected, people also experienced the feeling of being in a country where everything was possible. During those periods, a sort of intoxication is pervasive, not only among political leaders, in which it is impossible to discuss the need to manufacture things other than oil.

Back to the Lusinchi presidency in 1984. The era of low oil prices in the international market led to measures in two directions: Currency devaluation – thereby making a lower public revenue in dollars more profitable to postpone the political fallout of national budget cuts, on the other hand, stimulus of national manufacturing.

The word *du jour* was 'industrialization'. Over the years, much more was said than done. Political decision-makers paid lip service to

industrialization only at times of low oil prices; but it was swiftly dismissed as soon as the oil price cycles picked up during the last five decades.

Miguel Ignacio Purroy (1984), then an article writer and university professor, warned the Lusinchi government about the scope of the economic measures to be taken. They could not be limited to the exchange rate and the focus should really be on national manufacturing:

> [...] the urgency (for taking measures) lies in the inflationary germ of any devaluation. Devaluation is good, as long as it leads to an expansion of production. If this expansion does not take place, devaluation generates only and solely inflation, and of the most perverse kind. (Purroy, 1984)

Since 1984, Purroy argued that in Venezuela it was an absolute priority to move forward to an import substitution policy. In his analysis, Purroy already made it clear that private business had a key role to play in this longed-for economic reactivation.

Already in the 21st century, the warning calls made by economic thinkers continued. Universidad de Los Andes (ULA) professor and World Bank (WB) advisor Alejandro Gutiérrez questioned the fact that, during the Nicolás Maduro government, the economic policy was limited to fictitiously fixing the dollar exchange rate; but the country's core problem was not addressed: Lack of manufacturing. Venezuela is still unable to guarantee its food self-sufficiency.

During an interview granted to Víctor Salmerón (2017), Alejandro Gutiérrez questioned the Bolivarian Revolution for its pretense of " solving everything with imports". The country seems caught in a circle revolving around its problems to always return to the same diagnoses.

In 1984, the proposal of the social agreement spearheaded by Jaime Lusinchi as his main political pillar of government was also a motive for debate. Unfortunately, the lack of avenues for popular participation in the national conversation and the partisan co-optation of entities such as the Venezuelan Workers' Confederation (Confederación de Trabajadores de Venezuela, CTV), aligned with the ruling AD party, would end up being factors spurring the need for a major change in the political system, which finally arrived in 1999 with Hugo Chávez.

According to Arístides Torres (1985), "growing hints of generalized dissatisfaction on the part of voters, of corruption, of bureaucratic inefficiency, and of questioning of party leadership and management" were beginning to manifest themselves. There was, in fact, a favorable climate among academic groups, public opinion leaders, and a fledgling citizen movement, for a change in the political and electoral system to be discussed and approved. In essence, it was proposed that those "elected should serve the interest of the people and not that of their parties".

The regime crisis experienced by the ruling elites as threats to their power in a process of de-democratization – as pointed out by Tilly (2007) – is evident in these lukewarm responses to their interests and revolving stories to the substantial priorities of citizens and the nation, such as industrialization. It was true in the 1980s and remains true in the 2010-2020s.

The democratic model that emerged in Venezuela after the dictatorship of Marcos Pérez Jiménez not only failed in managing institutions towards perfecting their democratic nature, but also failed to resolve social inequalities. This catalyzed the overwhelming electoral victory, in December 1998, of a Hugo Chávez who promised a Bolivarian Revolution full of social justice and a war against corruption.

Fast forward to July 2020, revealing data from the Living Conditions Survey (Encuesta de Condiciones de Vida, Encovi), on poverty were released. Venezuelans who do not consume 2,200 calories a day from a basic food basket are extremely poor. Those who are able to ingest these calories, but cannot afford utilities such as electricity and transportation, are poor. Per the Encovi, at the end of 2019, 79.3% of Venezuelans lived in extreme poverty and 96.2% were poor (quoted by Salmerón, 2020, July 7).

Precisely in March 1999, at the beginning of Hugo Chávez's government, poverty and impoverishment were two priority issues in the social agenda for the nation. Putting an end to poverty was one of the most vocal promises of the Bolivarian Revolution. After more than two decades, the country is not only still marked by poverty, but it increased exponentially vis-à-vis the last administration of the two-party democratic period (1958-1998).

Back in 1998, Mercedes Pulido (1999) noted that a Venezuelan household required 2.5 minimum wages to meet its basic needs. This implied that, in poor households, at least two people had to work, something unlikely because of unemployment (not so high in those years) but also due to the erosion of the formal employment market.

Pulido proposed as priorities to strengthen basic education, improve the quality of employment, increase the number of jobs, address factors with a high impact on poverty such as teenage pregnancy, and devise stable policies to assist the poorest with schemes to prevent their dependence on government handouts as a way of life.

Chávez's unfulfilled promise made it evident that the fight against poverty cannot rest only on the will of one man, but that different institutional actions of a multidisciplinary nature and sustainable in the long haul are required. The Venezuelan experience at the beginning of the 21st century shows that spreading the wealth only mitigates poverty – for a while, as long as the State provides. Once the country falls back into low oil prices, poverty also rises sharply. To date, there is no evidence of social or political learning in this regard.

Back to the value of elementary education as a factor of social mobility, we see a counter-intuitive effort. In the years of the Bolivarian Revolution, emphasis was placed on the multiplication of universities, with projects and proposals of dubious academic quality. This was a political response to the autonomy and independence of public and private institutions of higher education[9] facing political power.

According to projections made by Venezuelan education expert Juan Maragall (2017, June 13), based on surveys conducted in Miranda State, half a million children had deserted from schools during the 2016-2017 academic year. In total, according to Maragall's estimates, 1.5 million children and teens are excluded from the school system in Venezuela. There is no official response to this compelling issue.

The lack of government action to what is truly core social issues became evident by this sad paradox: While such school desertion was taking place in 2017, the relevant minister seemed more preoccupied in political duties, following his appointment as head of the ruling-party campaign for a second National Constitutional Assembly

(Asamblea Nacional Constituyente, ANC)[10] which, after three years in session, could not even produce an article for another promised new constitution.

A perverse circle was then repeating itself, and we are facing it again in the second decade of the 21st century: As it receives fewer dollars, the Venezuelan government gets more indebted to keep up with its expenses and issues inorganic currency to fund its populist policies. Nothing seems to have changed, it is the history of the challenge as a society that repeats itself endlessly in Venezuela.

Conclusion

In the four decades encompassing this research, we could identify processes giving rise to factors decisive in the de-democratization of Venezuela. The time frame selected enabled a dispassionate analysis of issues addressed in this article. This freed us from the breaking news or news cycle mindset in the benefit of English-speaking readers, which enables them to make a clearer, deeper sense of the how's and why's of Venezuela's political landscape.

The early body of work originating this investigation relied on views of the American scholars chosen for the original project at the UCAB, namely Levitsky and Ziblatt, as well as Kapstein and Converse. The former two contribute primarily political concepts into the study of failing democracies, while the latter authors, albeit including economic concerns in their view, fail to address more intently social issues and the role of the titleholders of the system of democratic government, that is, the people. Even Yanina Welp, who made a clearer statement on the implications of social unrest in de-democratization, does not look much further into citizen participation.

Consequently, for this research, and seeking to broaden the perspective on the matter discussed, we included concepts from Vallès, Tilly, Alikhani, and Sermeño. Thereby, we attempt at providing our work with facets from American and European worldviews, increasing Latin American perceptions, and integrate those of a scholar with a Middle Eastern background. It would be pretentious to call our

activity on these academics' contributions a conceptual framework; we merely gathered a modest, yet diverse toolkit to explore the decline of democracy in Venezuela from a more comprehensive perspective.

Both the model of political compromise in Venezuela's democratic system under *Puntofijismo* and the current regime under *Chavismo* proved true many of the concerns raised by the group of scholars relied upon. Some of the indicators of de-democratization can be found below:

From Levitsky and Ziblatt's standpoint, over his early months in office, it was not accurate to call Chávez's government a dictatorship since there was room for action by the opposition. His dismantling of democracy formally began with the nature and behavior of the *Constituyente*. Prior to that development, apart from the undeniable fact of breaking into the national stage by means of his two failed coup attempts in 1992, only the makeshift outfit hastily established as his political party, then known as the MVR, and his skills as an "extreme demagogue" were the only two hints at his detachment from the rules of the democratic game. This rejection or weak commitment to rules is the first set of indicators conceptualized by the two above scholars.

As for the other sets of indicators to identify the profile of politicians prone to destroy a democratic system, *Chavismo* fills all the boxes. Both Chávez and Maduro have gradually denied the legitimacy of political opponents, from gerrymandering the *Constituyente* and the Legislative to repressing, incarcerating, and torturing opponents and political dissent, as documented by the OHCHR fact-finding missions, and different measures in between, such as having candidates disqualified or taking over parties through lawfare. Not only has the regime tolerated, but it also has encouraged violence by means of both repression and crackdowns targeting demonstrators and clashes with armed *colectivo*[11] groups. As for curtailing civil liberties, the latest iterations of the Chapultepec Index of Freedom of Expression and the Press place the country at the bottom of its ranking.

Regarding the social dimension of de-democratization, Yanina Welp (2020) allows us to notice that poverty grew amid a higher oil revenue; corruption became rampant as public budgets quadrupled. All this became a breeding ground for social unrest and the delegitimization

of democracy.

The critical indicator ultimately unveiling the de-democratizing nature or early *Chavismo* was that noted by Kapstein and Converse (2008): A leader who, once in power, focused on reversing the constitutional rules in force by convening a *Constituyente* for enacting a tailor-made law of the land. This was conducted under the guise of the need of doing away with "representative democracy" and replacing it for a "participatory democracy".

Josep María Vallès (2013) points to a systemic change of a regressive nature. A decline in the already weakened institutional framework, an increase of state intervention in the economy and expropriations, as well as greater vulnerability of underprivileged groups, steep increase of poverty, and a worsened climate for the exercise of free speech and other civil liberties by means of repression are examples of this democratic regression.

Viewed under the definition of de-democratization by Charles Tilly (2007), the first presidential term of Carlos Andrés Pérez was the last golden opportunity to re-establish democracy, to renew the link between the people and the political class. Another example of crises poorly addressed by the elite was the looming debt of Venezuela's representative democracy towards social issues, as well as the remedy producing worse results in the form of a model built on socialism, one with worse results and deeper inequality.

This process of gradual de-democratization became more evident in the mid-1980s at the hands of political class unable to reinvent itself. Ever since traditional parties and their accompanying elite established since the late 1950s with the advent of democracy in the nation lost control over government bodies, they have been sabotaging themselves by their deep-seated undemocratic instincts. Therefore, their condition of previous elite – or yet unconsolidated elite – continues to display an unsatisfactory response to crises.

Another evidence of poor handling of threats to power is the lukewarm responses to and revolving stories about such key national priorities as industrialization. This has been an issue unresolved by the administrations in the 1980s and the ruling regime as of 1999.

Power-monopolizing practices of the current regime are evident in its undermining of the performance of the opposition, control over the media, taking over of a greater extent of non-energy means of production, circumventing of legitimate, long-standing local government bodies by means of the communes, to mention a few. It is practically impossible for Venezuelans to go about their daily activities without paying money to, dealing with overregulation by, or being subjected to the discretionarily of the regime.

As for the widening extent of arbitrary and illegal traits in the performance of government bodies, as well as in the weakening of the representative constitutional framework regulating the authority of the branches of government idented by Ángel Sermeño (2021) as de-democratization, rulers of the last stretch of Venezuela's representative democracy and of the sitting regime have been eager to produce plentiful evidence: Corruption stemming from the mishandling of oil revenue has chronically weakened the nation's institutional framework; quasi-mythical cult of personality around *caudillos* has been covertly or overtly nurtured by Pérez and Chávez in a non-institutional relationship blurring the mediation between citizens and concerned government bodies; previously increasing poverty has given way to currently exacerbated inequality; opacity in and lack of official data has been the trademark of the Maduro administration; and the strategy sustained over time by the Bolivarian Revolution in eroding, weakening, contradicting even its custom-made constitution.

Despite all the process of de-democratization taking place in Venezuela over the last four decades. The civil liberties experiment started in 1958 has been successful to an extent: Two generations of Venezuelans grew up in democracy and have instilled its values in their children and grandchildren. One possible gap in the country's institutional fabric during the second half of the 20th century was that guilds and associations were co-opted by political parties because there was no culture of citizen participation.

Subsequently, from the early signs of de-democratization in the 1980s, citizens have increasingly engaged in the public arena and, even with the restrictions imposed and the repression deployed in the context of increasing monopoly of power by the current regime, they have woven a vibrant fabric of NGOs and CSOs. Even amid the current

threats to their activities, seeds of a democratic culture keep growing across the nation.

We have questioned that the role of citizens is not addressed by most of the scholars from our conceptual toolkit, hence our intent to close this research with our appraisal of its relevance. How effective a deterrent of authoritarian practices these citizen traits of democratic culture can become is yet to be seen. Academic output in the future may focus on this potential role. Will this citizen participation peacefully and gradually permeate parties, communities, and education? Will any efforts in this regard be effectively undermined by the regime? Will attempts at gaining citizen participation spaces take the form of clashes and protests being met with repression? In the years to come, we will witness whether the dismantling of democracy in Venezuela can keep its course unchallenged or to which extent efforts to restore civic freedoms may succeed.

NOTES

1. Pink Tide: Catchall term for the different center-left of further leftist governments sweeping across Latin America at the turn of the 21st century.
2. Viernes Negro: Literally "Black Friday", with no connection to the day for massive discount sales after Thanksgiving in the U.S., is the name given to the foreign exchange crisis resulting from a steep fall in Venezuela's international reserves on February 18, 2023.
3. Caracazo: Massive protests and riots staged in Caracas on February 27 and 28, 1989, in rejection of the FMI-sponsored package of fiscal discipline measures adopted by Carlos Andrés Pérez at the beginning of his second term in the presidential office.
4. (Asamblea) Constituyente: Constitutional convention not provided for in the Constitution of Venezuela of 1961, but convened after a ruling based on a draft opinion by pro-Chávez Supreme Court Justice Juan Miguel Matheus. This body was controlled by chavistas who drafted the current highest law of the land in Venezuela, after being approved via referendum in December 1999. Controversy regarding this convention arose because it both passed and enacted statutes of questionable legality. La Constituyente should not be confused for the National Constitutional Assembly.
5. Guarimbas: Name given to barricades as a form of protest by opposition supporters in 2004, 2014, and 2017.
6. Chiripero: Literally, a "swarm of German cockroaches (croton bugs, water-bugs)", it was the derogatory metaphor used in Venezuelan political jargon denoting a multitude of minorities of various partisan or non-partisan, social and community backgrounds during Rafael Caldera's second run for president in 1993. This candidate adopted the expression as a compliment to the diverse cross-section of his followers, thanks to whom he again became president. This demographic of disaffected voters of multiple backgrounds was capitalized by Hugo Chávez in 1998.
7. Rojos, rojitos: Loosely translated as "l'il reddish red", a term coined by former Oil Minister and state-owned Petróleos de Venezuela (PDVSA) CEO Rafael Ramírez for government-loyalist oil industry

workers' identity. This peculiar adjective spread as a symbol of loyalty to Chavismo.

8. Gran Venezuela / Venezuela Saudita: "Great Venezuela / Saudi Venezuela", names given to the times of personal prosperity, economic growth, business expansion, and government splurge caused by the increase of oil revenue following the Oil Embargo 1973–1974 and nationalization of Venezuela's oil industry.

9. University Autonomy: In Spanish-speaking countries, this concept reaches beyond academic autonomy as practiced in English-speaking countries. University autonomy is a legal doctrine originating in Spain and its Realms of Indies, as its colonies were known during the rule of Habsburg dynasty. Universities were established by royal charter (Cédula Real) providing for their own authority to appoint chancellors and other officials, conduct academic affairs, and exercise campus inviolability.

10. Asamblea Nacional Constituyente (ANC): That is, National Constitutional Assembly, a regime-engineered parallel constituent and legislative congress, which was not recognized internationally, established as a travesty of the constitutionally sanctioned mechanism by means of a non-competitive electoral contest. This body thus inaugurated in August 2017 was denounced by the Venezuelan opposition, its legitimate Legislative, the US Department of State, the OAS, the Inter-Parliamentary Union (IPU), among others. This second convention was adjourned in December 2020.

11. Colectivo / colectivo groups / colectivos: Regime-supporting (and sponsored) armed gangs posing as community workers ("collectives") aimed at clashing against and neutralizing opponents.

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Venezuela: Times of Depolarization

Ingrid Jiménez
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Background: 1998 Electoral Campaign

The 1998 electoral campaign was marked by a climate of political tension unbeknownst to the country in its contemporary history. The precedents of this situation should be found in the political crisis unleashed after the 1992 coups d'état. The first of these was headed by Hugo Chávez, a lieutenant colonel who created a military cabal in the 1980s inspired by the ideas of social vindication and egalitarianism from the Latin American left.

Venezuela had a representative democratic system, established by consensus among the different political and social forces since the overthrow of the last military dictatorship of General Marcos Pérez Jiménez in 1958. Democratic rule was largely tied to the redistribution of oil revenue, the country's main resource.

Venezuelan democracy survived coup d'état attempts. However, once Chávez's political rights were reinstated after a brief prison term, he

ran as a presidential candidate in the 1998 elections. The traditional parties, namely social democratic Acción Democrática (AD) and social Christian Independent Political Electoral Organization Committee (Comité de Organización Política Electoral Independiente, COPEI), were facing internal crises partly due to the tensions generated by the political decentralization process initiated by former President of the Republic Carlos Andrés Pérez (1989 - 1993) and the emergence of new leaders in different gubernatorial and mayoral offices.

Towards the end of the electoral campaign and in view of the broad support aroused by Chávez across society, the traditional parties gathered around the electoral bid of former Carabobo State Governor Henrique Salas Römer, in a central state of the country. Once the candidates running for president became official, the campaign polarized around the democracy-dictatorship dichotomy. The forces gathered around Chávez named themselves the Great Patriotic Pole, while the sectors supporting Salas Römer were known as the Democratic Pole. According to Lander and López Maya (1999), businesspersons and a significant section of the mainstream media, a wing of the Armed Forces, and many public opinion leaders began an erratic opposition to the emerging campaign of Chávez Frías.

For the authors mentioned above, Chávez was stigmatized as "authoritarian and an instigator of violence". Meanwhile, on the campaign trail, stomp speeches by this candidate held on to a violent and threatening narrative against the traditional political parties and those who opposed his plan to summon a constituent national assembly, his main campaign offer. The parties around the Democratic Pole also reacted inappropriately and disproportionately to Chávez's remarks, and encouraged the stigmatization of his followers as citizens lacking formal education and belonging to the underprivileged classes.

Lander and López Maya (1999) estimated that the starting point of polarization in the country was the 1998 electoral run won by Hugo Chávez by a landslide (according to official figures, he obtained 56% of the votes, that is, 3,573,685, against 39.97% for Salas Römer, with 2,613,161 votes). From then on, Chávez embodied change and hope for a great part of the impoverished masses effectively disenfranchised from the country's political and social system. The opposition, fragmented after the triumph of the Patriotic Pole, experienced a

representation crisis which subsequently enabled the success of the *Chavista* agenda for the election of representatives for the National Constituent Assembly of 2000 (going by the moniker *La Constituyente*) and the drafting of a new highest law of the land. One can safely say that the 1998 elections meant the total transformation of the Venezuelan political system and the beginning of Hugo Chávez's hegemony.

Political Polarization: Democracy v. Dictatorship 1999 - 2006

As stated above, the process of political change initiated by Chávez was oriented in the first place to the change of the 1961 Constitution by means of *La Constituyente*. There is no doubt that the 1999 Constitution is republican and democratic, although its majority electoral system ("winner takes all" in a voting district) implemented for its assemblypersons, prevented an accurate representation of the country's plurality.

However, at a second stage initiated in 2001 with the passing of a package of laws sponsored by the president by means of a mechanism named 'Enabling Law' whereby he had temporary authority to legislate by decree, as well as the coup attempt in 2002, reactivated the polarization in the country. The differences between government supporters and opponents began to become irreconcilable, amid a poor-rich dichotomy fueled by Chávez.

Despite mediation efforts by the Organization of American States (OAS), through the so-called Table of Negotiation and Agreements of 2003, which reached a compromise to hold a recall referendum, this political crisis was not resolved, as the government failed to comply with its commitments. One of the key points of the agreement, a recall referendum on the president, was protracted well into 2004, under unequal conditions for the opposition.

The private media played a decisive role in this climate of polarization and tension. Political analyst Andrés Cañizález (2009) explains that the media were part of the national political conflict, to such an extent that, during the OAS mediation, representatives of the main private and

state-owned media companies were called, highlighting the political positioning of the private media. For the author, this situation also had its counterpart in the bias of the state-owned media.

For Venezuelan sociologist and human rights activist Rafael Uzcátegui:

> Since 2004, Venezuela's political outlook has been dominated by the permanent conversion of citizen mobilization agendas into a mere electoral concern. Except for 2011, electoral events were held in all annual periods; the list includes, up to 2012, two presidential elections, three referendums, two parliamentary elections, four gubernatorial and two municipal elections. The holding of the elections has promoted, with different intensities over time, a process of political polarization by which voters have chosen from two proposals for a country publicized as antagonistic and mutually exclusive without actually being so. (Uzcátegui, 2013)

According to Saúl Cabrera (2023), director of opinion research firm Consultores 21, Chávez almost always maintained high approval ratings. When he was elected in 1998, he obtained a 50% approval; in 2000, he reached a record 65%. In the months prior to the 2004 presidential recall referendum, his approval was at its lowest point at 35%. However, the social programs created shortly before such vote boosted his popularity and he was able to win this contest comfortably with 59% of the votes.

Since Chávez was elected president in 1998, the country's politics revolved around him; he defined the country's public agenda and encouraged polarization from his position of power. For Juan Manuel Trak (2017) "*Chavismo* / anti-*Chavismo* or ruling party / opposition were erected as labels under which Venezuelans placed themselves and others."

Ideological Political Polarization 2006 - 2017

During this period, it was possible to witness an intensified polarization in the country and a solidification of Chávez's popularity, who took a further step to control government institutions. When he was reelected in 2006, he proposed a constitutional amendment in open contradiction with the highest law of the land approved by referendum in 1999. This reform implied the imposition of a socialist state.

For Venezuelan researcher Margarita López Maya:

> With the 2007 constitutional reform project, drafted by Chávez and the National Assembly [*federal Legislative*], then controlled by the government coalition, the turn towards the creation of a popular power different from the popular sovereignty of the Constitution became clear. Article 16 of that reform proposed the creation of the popular power as a new structure among the branches of government, formed by 'communities', which he called 'geographical hubs of the Socialist State', and which "does not arise from suffrage or any election, but from the condition of human groups organized as the basis of the population" (Article 136). The popular power became the basis for a public power that claimed to be qualitatively different from the other branches of government. (López, 2018)

The reform was rejected by voters in a referendum; but the foundations of what was called 'popular power' were imposed since 2009 through pieces of legislation openly defying the current constitution.

This time, Chávez's approval ratings were not enough to press the amendment forward. The exacerbation of the polarizing discourse and the increase of control over the population through social aid handouts kept dividing Venezuelans. The turning point of this period was 2012. That year, a new presidential election was called for which Chávez ran again, thanks to a controversial constitutional amendment that removed term limits. This change revealed much more clearly the hegemonic nature of *Chavismo*.

Nevertheless, the country was already beginning to experience some changes. The economic model based on the extraction of oil and minerals by state monopolies and the redistribution of wealth showed signs of weakness. Until then, Chávez was the all-powerful leader and there was no one else but him within the ruling coalition; but his sudden illness and physical decline as of 2011 opened the door to reorganizing the opposition forces.

It can be said that the 2012 presidential election was significant evidence that polarization was beginning to give way in the country. The young governor of Miranda state, Henrique Capriles, of the Primero Justicia party (center left), became the opposition standard bearer after a successful open primary process with a significant turnout.

In López Maya's view:

> His (Capriles's) first supposed advantage was to be a young and healthy candidate against a candidate in the terminal phase of a serious illness, so his main asset was to have canvassed 300 towns in the four months of the campaign to make 'face-to-face' contact with his potential voters... under the slogan 'there is a way'. López Maya (2018)

Candidate Capriles avoided polarizing with Chávez and lost by a margin much narrower than expected (approximately 9%, obtaining more than 6 million votes). Capriles's run and his conciliatory discourse began to break somewhat with Chávez's excluding 'us against them' rhetoric.

Likewise, it was still evident that voters continued to support Chávez. Despite doubts about his fitness to begin a new term in January 2013 due to his serious health condition, he got over eight million votes.

In fact, after Chávez's death in April 2013, Nicolás Maduro, the leader chosen by him to succeed him, won the presidential election called with a mere 1.5% lead over Henrique Capriles, the candidate of the opposition coalition, then named Democratic Unity Roundtable (Mesa de la Unidad Democrática, MUD).

Another milestone during this period was the election of the 2015 National Assembly. This contest had important repercussions for the life of the country. In that election and amid all the unfair advantage tactics deployed by the elite in power, the opposition coalition MUD obtained an overwhelming majority of 112 representatives against 51 for *Chavismo*.

In an article for *El País*, Spanish journalist Javier Lafuente states:

> This victory constitutes an epic blow to the figure and rule of President Nicolás Maduro, since the elections had become a plebiscite of sorts. The economic crisis, the crime rate, or the persecution of opposition leaders have been enough reasons for society to have said 'enough' and opted for a change in the political landscape of the country. (Lafuente, 2015, December 7)

The results showed that *Chavismo* was no longer majority. They also constitute another proof that Chávez's polarizing discourse no longer resonated with a society overwhelmed by a survival living standard and

the economic crisis affecting government and opposition supporters alike.

It is worth underscoring that, barely three years after Chávez's passing, society began to move towards depolarization. A survey conducted by the Universidad Católica Andrés Bello (UCAB) in 2015 on citizen perception of the electoral system clearly shows that citizens voiced their rejection of politicians, both pro-government and opposition.

Respondents identified themselves outside the government-opposition poles in a 55.1%, and 25% stated that all politicians were the same. In a context of tension and polarizing discourse, this time by newly inaugurated President Nicolás Maduro, voters began to move away from the poles. In the same survey, a negative perception of the country's direction is also reflected in 86.9%.

Moreover, during these early years of Maduro's term in office, the stability of the regime was compromised, following two cycles of protests in 2014 and 2017 that caused hundreds of casualties and injuries (La Fiscalía venezolana… 2017).

Describing the political moment following the protests, psychologist, professor, and researcher Manuel Llorens explained:

> Trust in representatives, institutions, and the community itself has been lost. A revealing sign of the widespread distrust is the infighting and dismemberment of the opposition. Sections of the population accuse opposition politicians of betraying the demonstrators who died in the streets. As casualties increase among the social movements, part of those involved experience the possibility of any negotiated solution as a betrayal. While the government's popularity has continued to drop, support for the MUD has not increased. As of December 2017, in a national survey, 61% of the population assessed the administration of the national government as bad. That same survey found that 57% of the population assessed the performance of [opposition-controlled] National Assembly negatively, and 74% expressed the same regarding the National Constituent Assembly [of 2017] [...] *Chavismo* was able to survive and hold on to power with minor fractures. (Llorens, 2017)

A study conducted on the crisis and democracy in Venezuela by the Center for Political Studies of the UCAB (Centro de Estudios Políticos de la UCAB, CEPUCAB), compiled by researcher Juan Manuel Trak (2017) shortly before the 2017 cycle of protests, found that barely

12.29% of voters identified themselves with the MUD and 12.89% with *Chavismo*. This clearly evidenced the disaffection of Venezuelans for both poles.

For the opposition, this meant a terrible defeat which led to the dissolution of the fragile unity of its various movements and parties with the consequent demobilization of society. Once more, *Chavismo* polarized the country through elections, such were the cases of those for the National Constituent Assembly (Asamblea Nacional Constituyente, ANC) in July 2017 – inaugurated in August – and the immediate call for gubernatorial and mayoral elections in October that year.

It is important to note that, in those years, the opposition also participated in the polarizing dynamics. The gap between moderate and radical sectors became increasingly evident, the former in favor of a resolution of the conflict through electoral means, as opposed to the latter in favor of the use of violence to overthrow the government. Therefore, it can be affirmed that polarization also occurred within the opposition.

Resuming the insurrectional strategy in 2017 prevented the opposition from advancing in the search for a governance compromise that could make a way for a political transition. Unfortunately, the favorable juncture after the parliamentary election in 2015 and the beginning of the process of citizen indifference towards the political poles were aborted.

Those years, there were also efforts by the international community to settle the Venezuelan conflict, among them those made by the Union of South American Nations (USAN [UNASUR in Spanish]) and the Vatican; but these mediation efforts failed because the government was not willing to comply with any agreements, while it was becoming more radical internally.

It is worth noting that, during this period, President Maduro could not increase his approval ratings, being rejected by a large part of the country since the beginning of his term in office. According to polling firm Datanálisis (Reuters, 2017, June 27), his disapproval rating was 76.4%; in 2018, after the cycle of protests that shook the country the

previous year, his approval barely reached 20% of voters.

This negative appraisal of his performance increased in 2018 according to the same opinion research firm. Venezuelans, namely 84% of them, rejected his administration and expected him to step down that same year.

The context in which these changes occurred was framed in a worsening economic crisis. The shortage of staple products was caused by price and exchange control policies, inflation, and increased political repression.

The Long Road to Depolarization

One of the political phenomena that has caused the most negative impact on public life and democracies has been precisely polarization (Naím, 2022). From great divisions in societies to attempts to crush internal dissidence, these are harmful consequences of a process of an exercise of politics that does not admit halfway stances or thorough analysis, but rather partisan militancy anchored to argumentative or ideological rigidity rather than reality. Many countries in the region have experienced and continue to experience effects associated to polarization that have undermined their internal institutional frameworks and mechanisms of adequately managing conflict. In Latin America and the Caribbean, Venezuela has been the clearest example of this.

Starting in 2019, after more than twenty years of polarization and internal division, Venezuelan society began to define itself as absolutely de-ideologized and disaffected from the political poles that had been typical of it for so long. Instead, since that year, pragmatism has gained ground, stemming from the harsh economic reality experienced by the population, which has greatly affected their daily lives. Especially among underprivileged communities, which were the primary targets of the argumentation and ideological frameworks of polarization, there is a clear aversion to continue with divisive narratives or point at any so-called 'common enemies'. This conjuncture shows how people, weary of polarizing tales, take refuge in political independence far

from parties and leaders who cling to a rationale similar to that of the last two decades, which evidently no longer represents the collective feeling of the population and the structure of the popular imagination.

This new feature of Venezuelan society is more clearly linked to a depolarization process that has not yet resonated with the country's leadership, hence precisely the current disconnect and the immense challenges to redirect the country towards an electoral path. However, some steps are being taken more from the grassroots than from the leadership. The important and salvageable aspect of this process is to fix and make visible in the public agenda all the damage that polarization can cause in a country with democratic institutions that, albeit imperfect, allowed settling differences amid a plurality of options.

Even public opinion polls of 2018 and 2019, such as those by Datincorp and Delphos (cited by Martínez, 2019, April 13), show how more than a third of voters do not identify with either the opposition or the government.

The hard road to depolarization has been full of ordeals too hard for the population. The collapsed economy and utilities, the destroyed quality of life, the hatred rooted in many groups, and others are evidence of the need to look closely into this phenomenon that is increasingly gaining momentum around the world every day.

Depolarization has set the tone for a gradual depoliticization of society. Several public opinion studies from 2020 onwards, conducted by such firms widely known in the country as Datincorp, Datanálisis, and Delphos (cited by Ramírez, 2023, March 15), show a generalized disappointment of society with parties and politicians. Furthermore, a significant 81.1% of the population desires a change of rule in the country, as found by Delphos.

The disconnect is impressive even factoring in the high levels of rejection that sitting president Nicolás Maduro continues to arouse. The current profile of Venezuelan society is marked by a deep fragmentation of its political leadership, with the ruling United Socialist Party of Venezuela (Partido Socialista Unido de Venezuela, PSUV) being the first organized minority and below it a large number of political organizations with precarious levels of support compared

to the entirety of the electorate.

According to a survey by Datincorp (El Nacional, 2023, February 8), the preference for the ruling party barely reaches 18.5% of voters. Meanwhile, 54.19% say they do not identify with any political movement.

This detachment of citizens from traditional political parties and poles is also geared towards a search for new leaders. In 2019, according to the firm Consultores 21, 73% of Venezuelans clamored for the need of new a leadership in the country. This lack of leading figures is expressed in the positive ratings held by Chávez ten years after his death: 56%, against 22% by Maduro according to opinion research firm Datanálisis (Santaeulalia *et al*, 2023, March 5).

This phenomenon shows a growing depolarization of the Venezuelan population. Rather, through other types of assessment more associated with their particular and collective needs, it shows a process against the tide of over two decades of disagreements and disputes, often bordering on political violence, as has been escribed throughout this paper.

It is estimated that migration has also had a decisive impact in the transformation of political identification, since according to the Office of the United Nations High Commissioner for Refugees (UNHCR, 2023) more than seven million Venezuelans have left the country. Of these, six million are scattered across Latin America.

In 2019, a political development further complicating the Venezuelan crisis occurred. National Assembly Speaker Juan Guaidó, member of opposition party Voluntad Popular, proclaimed himself interim president of Venezuela following the Legislative's disavowal of the 2018 presidential election. Guaidó invoked Article 233 of the Venezuelan constitution which sets forth that, if by the beginning of the presidential term (January 10) there is no president-elect, the National Assembly Speaker takes the executive office until new elections are held.

The National Assembly Speaker was recognized by most democratic countries, and obtained significant support from the United States; but it soon became evident that this strategy headed the opposition for a new dead end. Meanwhile, Maduro continued to hold effective

power in the country. The objective of this 'interim government', as the opposition called it, was to push and trigger a political transition.

In the early months of 2019, popular support for Congressman Guaidó was very high, at 56.5% according to opinion research firm Datanálisis (2019). Subsequently, as the expectation of change lost momentum, the support decreased to the point that, at the beginning of 2021, the same opinion research firm (2021) reflected that barely 11.5% of those inquired would vote for him in a hypothetical presidential election.

Early support for Congressman Guaidó also revealed a desire for change in society. This did not come exclusively from those who identify with the opposition, as happened in the recent past, but from a significant number of Venezuelans who were depolarized by having their basic needs unmet, thereby assessing the government's performance negatively.

The truth is that, after more than twenty years of polarization and internal division, Venezuelan society today is marked by an absolutely de-ideologized vision and a disconnect from the political poles typical of it for so long. According to Delphos (quoted by Brando, 2021, July 22), 36.9% of voters favor fair elections. Consequently, the choice for a peaceful solution to the crisis continues to be prevalent.

Therefore, as of 2019, Maduro's rule has evolved towards pragmatism and de-ideologization to remain in power. Meanwhile, the opposition is still searching for the strategies and narratives required to reconnect with citizens.

López Maya explains that:

> The project based on the 1999 Constitution was replaced by an autocratic one; but there maintains the rhetoric of the radical left, although with high doses of pragmatism, which led, for example, to the *de facto* dollarization of the economy, and very high levels of corruption. (López Maya, 2023)

In any case, this incomplete liberalization of the economy has allowed the government to gain stability in the face of a demobilized population focused on survival.

A survey conducted by Datincorp (2023) reveals the reaffirmation of trends among Venezuela's public opinion in recent years, 70% express feeling a great disappointment with politics, while a no less important 21% say they are completely indifferent.

On the other hand, negative assessment of the president's performance remains very high, standing at 73%. From this it can be inferred that the desire for political change remains in society, regardless of their partisan or ideological leanings.

Another important piece of data provided by the study is that 67% of citizens favor seeking negotiated solutions with the government, and continue to support change by means of elections (Seguías, as quoted by Olivares, 2023, February 15). Venezuelans are also in search of new political leaders: 47% expect the emergence of an independent to bring the country together. These figures show the leadership crisis existing both in the ruling party and in the opposition, which undoubtedly feeds depoliticization.

This clearly points to a depolarized Venezuelan voter profile, according to which the old divisive 'us against them' rhetoric of early *Chavismo* gives way to pragmatism, but without losing sight of the priority for political change in the country.

Conclusion

The people of Venezuela have been moving away from ideological poles to meet halfway on the ground of real needs that affect their daily lives. Political violence and dissent that intensified the differences among Venezuelans have been giving way to a path towards reconciliation from the grassroots away from political parties and their leadership.

A framework of reference for de-politization among the population has been building up: More than 70% of the people do not believe in political parties or political leaders. In this scenario, the polarization that marked the country since 1998 can hardly find a place and popular impact if invoked by any particular leader. Today, the way of 'triangulation' (Morris, 2003) has much more weight electorally speaking than a return to polarizing appeals.

The narratives of the political leadership have significantly lost ground in the collective imagination. Undoubtedly, the pandemic and the multidimensional crisis that has been affecting the Venezuelan population for the last ten years undermined any support achieved by resorting to polarization. Now, this gap has encouraged the depoliticization of society which requires a realignment of interests and discourse.

The majority of Venezuelan society leans towards dialogue, reunion, and an electoral solution that guarantees minimum conditions required to encourage a process recognized by all parties involved.

Although depolarization has become a trend for the last few years, it does not mean that, early on in a new electoral contest for president, it cannot be used, especially by those who currently hold power: Nicolás Maduro and the PSUV. If such scenario is reconfigured, it will probably not have the same impact as in previous years because of the current traits of a Venezuelan society, weary of it, as something deemed outright useless for the development of the country in the collective and popular view.

In this process of citizen disbelief and depolarization, depoliticization is rooted, it may become a hindrance to political participation and work for the democratization of the country towards the next electoral contests. On the other hand, depolarization is also currently a factor in favor of any eventual progress by international mediation initiatives, as well as the reconstruction of the social fabric severely damaged during the hardest stage of polarization.

The case of Venezuela proves that the phenomenon of polarization is absolutely induced by political actors whose strategic goal is 'us against them' in order to obtain electoral gains. However, depolarization stems from circumstances that encourage the reunion of society based on common-interest issues generally affecting their daily lives. The look is focused on such topics in the face of the weariness and discredit growing among the population. People realize that they have been used by political operatives and distance themselves from politics as long as it is associated with different forms of polarization and confrontation.

As a phenomenon, polarization arouses enthusiasm because of its direct appeal to emotions, values, and feelings. In Venezuela, this combination was more than evident. However, when living conditions gradually deteriorated after Nicolás Maduro's electoral victory in 2013 and the economic consequences of the public policies spearheaded by Hugo Chávez since 1999 worsened following the adoption of wealth redistribution schemes supported only by the country's oil income, society began to disengage from the poles and took a path towards depoliticization. In other words, polarization is a phenomenon that is supported by expectations; but when these are lowered, leaders lose the initial appeal that catapulted them to power.

Venezuela has shown that, contingent on the influence of political parties on public opinion, polarization may or may not gain momentum. In 1998, the discredit of the two main political parties in the country, AD and COPEI, gave rise to the figure of the 'anonymous avenger', capable of holding the corrupt in check and driving the necessary changes in all areas. If the desire for change does not produce a revitalization of political systems, people will easily relate to whomever fuels polarization as an electoral strategy framed in a 'good against evil' dichotomy.

Polarization enables the dismantling of institutions, leaving in the hands of the 'leader' the 'quasi-divine' powers to make any kind of reforms without stopping to think about the consequences. Hyperleadership is directly associated with polarization. In Venezuela, both Hugo Chávez and Nicolás Maduro centralized decision making and the exercise of power directly in their hands under fallacious ideological premises.

Not only does polarization affect a country, but also it can have a deep impact on an entire region. With Venezuela, this has become evident. However, depolarization helps a country with diverging interests to encourage multilateral processes of convergence giving rise to reconciliation mechanisms beyond ideological differences, and setting parameters of democratic coexistence recognized by governments of opposing leanings.

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Disinformation in Venezuela: Media Ecosystem and Government Controls

Mariela Torrealba
Ysabel Viloria

Introduction: Outlook, Purposes, and Country Outlook

In a scenario of sustained humanitarian emergency with a severe political, social, and economic crisis, disinformation is found cross-sectionally in Venezuela's communications. The country faces disinformation and misinformation: The former, in which the term is understood as a deliberate and orchestrated process of proliferation and saturation of false news content, and the latter, linked to the lack or absence of information.

We propose, then, at first, to present an outlook of Venezuela's context; then we will describe the changes that have occurred in the media ecosystem to explain how disinformation is disseminated across the country under the classic form of the term, misinformation, i.e., gaps

and lack of information. We will then elaborate on how disinformation and hoaxes have developed in the country, how disinformation operations and hoaxes are conducted, and also how the national conversation is curbed on social media by government action.

Writing about Venezuela months before closing deadline for publication becomes a challenge given the staggering decline in a country that seems to be moving backwards. The reduction in the life expectancy of the population, the fall in practically all macroeconomic and social indicators, the reduction in the supply and scope of utilities (e.g., water, power, gas), the flight of at least a quarter of the country's population, the increase in maternal and infant mortality and malnutrition, the chronic shortage of gasoline in a country that was once a producer are facts that partly explain the complex humanitarian emergency in which this South American nation is immersed.

The complex humanitarian emergency has not been overcome even though, in early 2022, the country experienced a slight economic growth after seven uninterrupted years of declining gross domestic product (GDP). Hyperinflation seemed to be slowing down. However, its specter haunts an economy that has not been able to overcome its problems and, as reported by the Venezuelan Observatory of Finance (Observatorio Venezolano de Finanzas, OVF) in July 2023, is once again in recession. The country does not have permanent access to drinking water and power outages are frequent. Amid the lack of official information, studies conducted by the Venezuelan Utilities Observatory (Observatorio Venezolano de Servicios Públicos, OVSP) reveal that over 60% of the population surveyed in 12 cities has an unfavorable opinion on their quality in reason of supply disruptions, which sometimes span over 45 days or more without piped water supply. *Apagones* (i.e., blackouts, unscheduled power outages) increased in 2022 by 22% with at least 233,298 interruptions. Telecommunications have improved due to the incursion of private internet service providers (ISPs) with costs unaffordable for an impoverished population whose income is not paid in hard currency.

The study on *Living Conditions of Venezuelans: between Humanitarian Emergency and Pandemic* (*Condiciones de Vida de los Venezolanos: entre Emergencia Humanitaria y Pandemia*, UCAB, 2022), conducted by the Universidad Católica Andrés Bello (UCAB), the Universidad Central

de Venezuela (UCV), and the Universidad Simón Bolívar (USB) does not bring good news. This study, making up for the lack of official information in the country, details how Venezuela lost the growth-driving demographic (children, teens, and young adults) in reason of the exodus experienced amid the complex humanitarian emergency and thereby abruptly changed the demographic structure due to the loss of its young population. This has altered aging and demographic burden indexes. They also reveal a statistical outlook in which eight out of ten Venezuelans are poor.

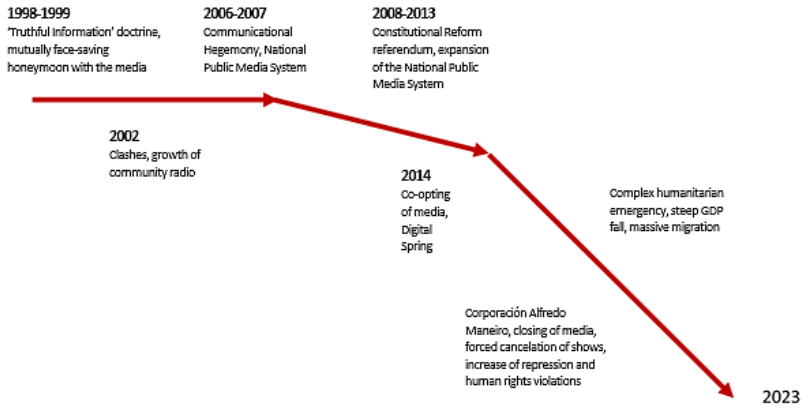
Against this backdrop, we should not ignore the impact of the migration experienced by the country in the last decade. As of March 2023, the Interagency Coordination Platform for Refugees and Migrants (R4V) estimates that there are more than 7.3 million refugees and migrants from Venezuela worldwide, of which over 6.14 million are in Latin America and the Caribbean. According to the Living Conditions Survey (Encuesta de Condiciones de Vida [Encovi)], UCAB, 2022), the age of 50.5% of those emigrating from Venezuela between 2017 and 2022 is between 15 and 29. The last census conducted in the country in 2011 estimated the total population at 29,096,159 inhabitants.

Along with an abrupt impoverishment of the population, Venezuela has experienced an institutional and political decline as reported by international organizations and multilateral entities concerned about the country's situation. Amid restrictions on public and citizen freedoms, those compromising freedom of expression and the right to information process have been particularly serious.

Changes across the Media Landscape

Over the past two decades, changes in Venezuela have impacted the way we perceive ourselves and how we are perceived as a country. They have been particularly significant in the media ecosystem, which has been transformed amid the creation and expansion of a government media system and the methodical attack on independent outlets. This has practically caused the destruction of the landscape we knew by the turn of the century.

Any attempts at summarizing the events that explain how we got to the current situation in almost a quarter of a century is a complex task of exclusion and selection. To accomplish it, we will give priority focus to few essential milestones and, for the sake of conciseness, we will rule out many others.



Graph 1. Milestones in Venezuela's changing media landscape

In 1998, the Venezuelan media ecosystem consisted of 124 daily newspapers and 375 AM or FM radio stations. In 1999, there was a total of 14 broadcast TV media operating on VHF (four national networks, three superstations, and two TV stations serving their home state markets) and 20 UHF broadcasting outlets (three superstations and 17 TV stations serving their home state markets). In addition, by that time, 16 pay TV companies provided services across the country. Despite the almost constant economic crisis in Venezuela, private media reached significant advertising revenues totaling USD 6.14 billion between 1991 and 1998. In the last years of the 20th century, the media increased their reach and coverage by continuously introducing technological upgrades.

An essential fact to understand the transformation undergone by the national media ecosystem is the change in communications and journalism from the government's perspective. Before *Chavismo*, successive economic crises – the one erupting in 1983, the debt crisis, and the so-called 'lost decade' – had eroded the government's media infrastructure, with a few outlets in precarious conditions. Towards

the end of 1998, the Venezuelan government had a VHF broadcast network (Venezolana de Televisión, VTV, channel 8), with increasingly outdated technology. In a move questioned at the time, the property of the then state-owned Televisora Nacional (channel 5) was transferred over to the Archbishopric of Caracas in early December 1998, shortly after the first election won by Hugo Chávez. Broadcast radio network Radio Nacional de Venezuela had only four stations. In addition, overall, state-owned media were technologically outdated, and government funding for media did not reach a single percentage digit. A proposal by Venezuela's Commission for State Reform (Comisión para la Reforma del Estado, Copre), sponsored by the United Nations Development Program (UNDP) and the United Nations Educational, Scientific and Cultural Organization (UNESCO), states: "In general, the allocations by the Venezuelan government for its own broadcast media are low – not reaching 0.05%, including the budget earmarks from the government to VTV and Radio Nacional [...]" The proposal also indicates that state-owned outlets (particularly TV) "have lost ground among the audience, quality and technical infrastructure for transmission and production" (Copre, 1998, 33).

Despite the Venezuelan public sector's communicational vulnerabilities at the time, government relationships with the media could be described as a *cordiale entente*. On that understanding, the media acted as a conduit for whistleblowing, including that contributing to erode the credibility of political parties, the government, and the entire political system.

During the first decade of the 20th century, Chávez prioritized communications as a whole, with himself front and center stage. Since he took the presidential office in February 1999, he would focus on "re-founding the Republic", by means of a Constituent Assembly (nicknamed *La Constituyente*) and would enjoy a brief, mutually face-saving honeymoon with the media.

From this first decade of the 20th century, we will only refer to one landmark event: The closing of the longest operating private broadcast network in Venezuela, RCTV, concurrently with new rules of the game for granting broadcast licenses under the doctrine of Communicational Hegemony and with the consequent creation of the originally-named National Public Media System (Sistema Nacional de Medios Públicos)

between 2008 and 2013. From that moment on, a new phase began. Worthy of mention is the dissident stance of the media during the era of the Coordinadora Democrática (CD) opposition coalition and the coup d'état of April 2002. For conciseness, we shall omit the (almost frantic) whirlwind in the field of communications, which for Chávez was a top priority as an avenue to connect politically with society, amid his permanent incitement against the media and journalists, as well as new rules that began to change the communications landscape.

Chávez, who was at center stage and wanted to be the only one there, confessed during some of his frequent and lengthy broadcast radio and TV addresses that he had a passion for hosting public events and for communications. Furthermore, early on his first term in the presidential office and at least until 2007, he contradictorily promoted citizen participation while co-opting and subjecting the wrongly called community media to his political agenda. He strengthened and expanded the state-owned media base, but controlled all their information policies and turned them into a propaganda apparatus at the service of his political project. It promoted the creation of a regulatory and institutional framework encouraging the use of the Internet while developing another for the control of the mainstream media. His "democracy of participants and protagonists" (democracia participativa y protagónica) degraded to a new form of old-school authoritarianism.

During the first decade of *Chavismo*, political scientist and media researcher Andrés Cañizález (2011) stated that its hegemonic tendencies took the forms of a narrative (denigrating and intimidating journalists and the media), of executive actions (open assaults on media facilities, aggressions against journalists, and denials of access to public information), of the statutory fabric (use of regulations and administrative resources, as well as court rulings), of media tools (use and abuse of airtime for mandatory broadcasts of presidential addresses and propagandistic bias of state-owned media), and of funding (withdrawal of government advertising to outlets critical of the government).

In May 2007, RCTV was closed under the pretext that its broadcast license had expired, thereby beginning the countdown of all broadcast TV and radio licenses granted in the 1980s and 1990s. Furthermore,

licenses, that until then had been granted for 20 years, began to be renewed for only five.

However, already in January that year, the government's media expansion, increasingly voracious, had already been given a name: Then-Minister of Information and Communication Andrés Izarra, declared to the media: "Socialism needs a 'communicational hegemony'. Hegemony in the media is an instrument required for the Revolution", and added defiantly: "Yes, we're going to have a communicational hegemony, so what?" (Transparencia Venezuela, 2023)

On the other hand, although the national government had proposed solidifying state-owned media, it was not until the second tenure of Andrés Izarra at the head of the People's Ministry for Communication and Information (2008-2009) when the creation of a National Public Media System was formally discussed. The growth of media outlets in the hands of the State is consistent with the proposals of the Simón Bolívar National Project, 2007-2013. This centralized economic and political plan claims to have as its purpose "to consolidate the national communications system as an instrument for strengthening the revolutionary democracy of protagonists and the formation of the public media". (Presidencia de la República, 2007, 16).

Paola Bautista de Alemán, as quoted in the report made by Transparencia Venezuela (2023), *A Forced Silence* (*Un Silencio a la Fuerza*) reports that the National Public Media System array operating between 2008 and 2013 consisted of seven television stations, five radio stations, including the Venezuelan News Agency (Agencia Venezolana de Noticias, AVN).

The report also states:

> Although they were not part of the National Public Media System, 244 community radio stations and 32 television stations contributed to disseminate and amplify the voices of the government sector as well as its narrative, in a travesty of the true essence of community media. (Transparencia Venezuela, 2023)

The academic and researcher in communications Agrivalca Canelón indicates that Chávez's government:

> [...] generated a metamorphosis in the structure of the media in Venezuela, increasing the number of players, their variety and ownership profile. In this regard, the magnitude of the public sector has expanded, increasing its media power to the point of becoming the second largest communications group in the country, judging by the number of broadcast radio and TV outlets it owns, including alternative and/or community media. (Canelón, 2014)

After Chávez's death, the National Public Media System was transformed into the Bolivarian System of Communication and Information (Sistema Bolivariano de Comunicación e Información, SiBCI). Additionally, as Paola Bautista de Alemán notes in the report mentioned above, "[...] the Bolivarian Revolution has achieved establishing a communicational monopoly serving the political-ideological objectives of the regime. The totalitarian communicational model and the hijacking of the media's narrative for propaganda purposes is a reality" (Transparencia Venezuela, 2023).

Although in this second decade of the century there is a state communicational monopoly, audiences reached by the governmental and 'para-governmental' media system – a term borrowed from Professor Marcelino Bisbal – were and still are very small. Already without Chávez alive as the leading voice (only remaining in file footage), changes in the media system have been intensified by governmental restrictions, particularly in 2014, 2017, and 2022.

Going back to 2014, communicational milestones included co-opting media dissenting from the government and the non-transparent acquisition of legacy, even centenary media. These moves involved broadcast media that had maintained challenging stances towards the government (e.g., 24-hour news channel Globovisión), traditional newspapers with over 100 years' activity (*El Universal*), or even involved media that had been very lenient with the government's performance (*Últimas Noticias* daily). Although these three buyouts are the most widely known and scrutinized, there is little information on a significant series of acquisitions involving local print, radio, and TV outlets over these years.

A review of studies conducted by Freedom House on freedom in the digital realm prepared by Raiza Uribarri for the communications research NGO Medianálisis notes:

> From being a relatively free country in 2011, restrictions escalated until, in 2017, it ranked as a country without freedom in the digital realm, a rating that still persists. There was a year in which the category referring to content improved one point, not because there were no restrictions, but because it was the period during which a remarkable group of Venezuelan journalists launched independent media startups to circumvent the censorship exerted by the government through operations of closure, acquisition, or manipulation of the editorial policies of the mainstream media. (Uribarri, 2021)

The researcher cited above points out that, since 2011 and until 2021, freedoms in the digital realm have been progressively and steadily curtailed. In addition, access has been deliberately narrowed and citizens frequently stumble upon blocked content or a digital realm contaminated by propaganda. The NGO Espacio Público reported that nearly 500 websites were blocked in Venezuela in February 2014, and different NGOs reported that online communications were slowed down during protests across the country. Transparencia Venezuela's report recalled:

> [...] the first attempt to control social media was made with the creation of alternative platforms as it is done in China. Therefore, in 2013 Nicolás Maduro called for the creation of a 'Bolivarian Twitter'. Two years later, the Red Patria (Fatherland Network) was born, with apps equivalent to known counterparts: Nido (Nest) functioned as Facebook, Colibrí (Hummingbird) as WhatsApp, and Cardenalito (Lil Cardinal) in lieu of Twitter; but those attempts failed due to the low interest they generated among the public. After the electoral defeat of the ruling party in the parliamentary elections, the government showed its concern about controlling the conversation on social media, primarily Twitter. (Transparencia Venezuela, 2023)

Likewise, as of 2014, through the concerned regulator National Telecommunications Commission (Comisión Nacional de Telecomunicaciones, Conatel), the government banned the transmission of international cable channels in the country. That year, Colombia-based pan-regional news channel NTN24, and in 2017 U.S.-based CNN, CNN en Español, Mexico's TV Azteca, Argentina's Todo Noticias and Colombia's Caracol TV and RCN were banned nationwide. During this second long phase, the government even suspended, in some cases temporarily in 2019, National Geographic, Antena 3 Internacional, VH1 HD, BBC World News, and DW Actualidad in the country.

Venezuelan professor and researcher Luisa Torrealba (2020) indicates that there has been a decrease in mobile and landline phone services, as well as pay TV. However, the number of internet users has experienced fewer oscillations between 2015 and 2019 with ISP penetration remaining at levels close to 60%. The researcher also notes other elements affecting internet penetration and access such as speed, unblocked access, electrical power available, among other elements.

The digitalization forced by the challenges posed to the media in Venezuela (they transform, change their frequency, scope, etc.) does not result from the incorporation and expansion of the technological telecommunications infrastructure, but from progressively restrictive government measures. Venezuelan journalists have taken it upon themselves to rise to the challenge by launching new online media. This so called 'Digital Spring' in Venezuela changed the ownership structure of the media: Journalists have become entrepreneurs and fight hard to provide news for Venezuelans; however, they face a country with electrical power disruptions, poor internet connection, as well as the restrictions, control, and persecution of a government that frequently resorts to media blockades. This has reached the point that Venezuelan online media can only be accessed through virtual private networks (VPNs).

The TV offer has been progressively controlled since the closing of RCTV, print media have been besieged (practically exterminated) in reason of the economic crisis and government policies. In research commissioned by Medianálisis, fake news debunker Héctor Rodríguez (2022) reports that the actions of state-owned newsprint monopoly Corporación Alfredo Maneiro towards newspapers gave the government the control of the production, distribution, and sales of books, magazines, posters, newspapers, and their most essential supply, newsprint. An investigation conducted by news website *Prodavinci* (2021) indicates that, by late 2021, only two daily newspapers were circulating in print format and another 20 are available at a less-than-daily frequency, after exceeding one hundred in 2013. Towards the end of 2022, based on data compiled by the Mapping of the Media (Mapeo de Medios) conducted by NGO Espacio Público, there remain 21 print media, of which 14 are daily newspapers, it should be noted that many of them circulate in a tabloid format, contain fewer pages, and circulate in smaller areas. Six of them are described as national

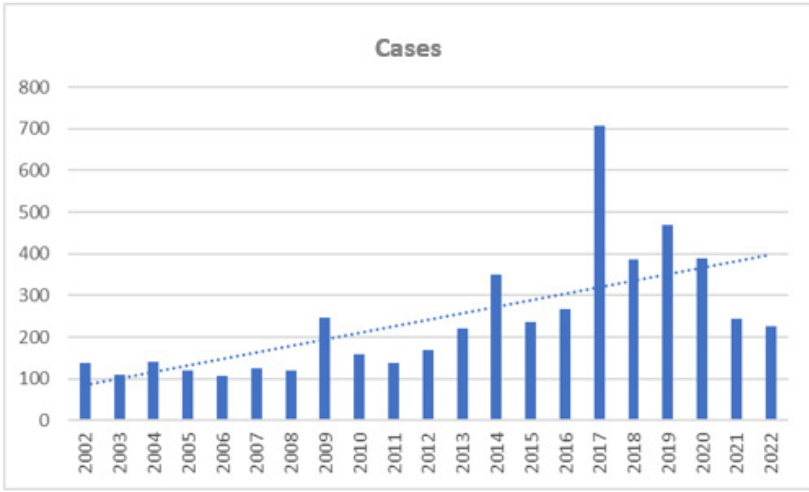
media and one as regional (one or more states), 18 are described as privately owned.

And although there was a first 'radiocide' in 2009 with the seizure of 32 radio stations, many others faced a long bureaucratic silence during which they have not been denied renewal of their broadcast licenses, yet they have not been granted. This placed these media in a vulnerable position. In 2017, the National Association of Journalists (Colegio Nacional de Periodistas, CNP) reported the closure of 55 radio stations. Furthermore, in 2022 the number exceeded one hundred, without counting the many radio shows closed following governmental pressure. This has turned Venezuelan radio stations into merely music-playing outlets. According to Espacio Público's Mapping of the Media, today there are 699 radio stations and 594 of them broadcast daily. Thirty-six of these stations cover the entire nation and another 74 are superstations. Seventy-five indicate that they cover all news sources, but those focusing on entertainment, music, religious programming, etc., prevail.

In research published by Medianálisis, Alfredo Álvarez (2020) indicates that figures released in 2012 revealed that there were just over a thousand radio stations operating in the country, barely over 700 FM and 300 AM. Researcher Luisa Torrealba reports nearly 300 radio stations closed between 2013 and 2022. The CNP estimates 103 stations closed only in 2022. It should be noted that, in Venezuela, broadcast media licenses are under the legal figure of concession from the Venezuelan State. Therefore, at any time, it can order all broadcast media to transmit mandatory simulcasts of official addresses and events, known as *cadenas* in Venezuela and other Latin American countries.

As an NGO that monitors violations of freedom of expression, Espacio Público reports that, between January and December 2022, a total 81 radio stations were closed in Venezuela over 16 states, in addition to another one closed on January 23, 2023. There were also 227 instances and 470 complaints of freedom of expression violations in the study period just concluded in 2022. In the first four months of 2023, the NGO reported 55 instances of freedom of expression violation.

Although freedom of expression violations were not exceptional during the final decades of the 20th century, starting with what has come to be known as *Chavismo*, they began to be massive and statistics of individualized cases began to emerge. The trend line in the graph shows the rise in cases of freedom of expression violations.



Graph 2. Cases of human rights violations reported by NGO Espacio Público, 2002-2022

In May 2023, in its Freedom in the World index, Washington D.C.-based NGO Freedom House again rated the country as not free, dropping to 15 out of 60, down one position from the previous year. In its 2023 report reviewing 180 countries, Reporters Without Borders (Reporters Sans Frontières, RSF) ranked Venezuela 159th.

The investigations of the access to information published by NGOs Instituto Prensa y Sociedad (IPyS) (Alvarado, 2023) and Transparencia Venezuela (2023) give a bleak picture: Nearly 15 million people live in full or moderate local news deserts; currently, the country has barely 21 print newspapers circulating at a restricted frequency and with a lower number of pages against the 121 that circulated in 2013; the situation of restriction and government control over the TV offer is constantly documented; in this regard, alerts are permanently issued on the closure of shows and stations; although independent digital media have emerged, the country has no reliable electricity supply, and Internet connection is primarily covers large cities just for the

minuscule section of the population that can afford its high costs against precarious income.

A survey on information and cultural consumption in the country conducted in September 2022 by Espacio Público and the UCAB indicates that 69.5% of the population never reads the written press and 20% do so occasionally; 40.3% prefer international cable channels to get news; 37.9% never visit news websites and 21% do so occasionally. In addition, 60.2% have stopped getting news occasionally because of power outages. For 62.9% of respondents, the primary way to get news is social media, although it is recognized as censored, and 29.6% of respondents say they get the latest news on television. The primary means to which the resort for news are WhatsApp (46.5%) and Facebook (15.1%).

This problematic situation points to an underinformed, uninformed, and misinformed population, among whom the Venezuelan government saturates all media spaces available.

A Bilingual View on Misinformation, Disinformation, Fake News, and Hoaxes

In the country's media landscape and amid government self-promotion, restriction, and control policies, disinformation and hoaxes are spreading. This is caused by the non-existence of alterative worldviews that a contrasting news ecosystem could provide to the population.

As native Spanish speakers, we, the authors of this research, wish to provide a broader perspective by analyzing the meaning of terms related to our study subject both in English and our mother tongue. According to the Oxford English Dictionary, misinformation is "the act of giving wrong information about something; the wrong information that is given", and disinformation is "false information that is given deliberately, especially by government organizations" (OUP, n.d.). Meanwhile, *desinformación* is the only term in Spanish and it encompasses the meanings of both 'misinformation' and 'disinformation'. Therefore, context should be examined when non-natives read sources in Spanish so that they find out if a specific instance

of the term implies a non-deliberate occurrence (misinformation) or malicious intent (disinformation).

In Venezuela, mis/disinformation (i.e., *desinformación*) is experienced in this twofold dimension: Both its meaning 'mis-', from 'wrong', and 'dis-', the deliberate one that has been considered increasingly significant in recent years. The term *desinformación* (as in 'disinformation'), explains Fernández (2020), also alludes to the increasingly deliberate efforts by certain stakeholders to misinform with lies, half-truths, or contaminating and even saturating citizens, in what have become known as 'disinformation operations'. It is a modality within what has been called 'problematic information'. He adds: "Disinformation leads to the trivialization of lies and, therefore, to the relativization of truth".

Parra and Oliveira (2018) explain that, since the end of the 20th century, we have seen large-scale disinformation campaigns addressing climate change, vaccines, food, nutrition, origins of life, health, weapons in the hands of citizens, generic drugs, cure or origin of diseases, nuclear energy, or the impact of migration. In addition, we have witnessed the infodemic that has spread rapidly in recent years and has been described by the World Health Organization (WHO), UNESCO, and other international organizations as being similar in severity to that of a pandemic.

It is often discussed whether we should speak of fake news or disinformation. Disinformation is a broad field that includes fake news, but omissions, saturation, and other forms of manipulation of information are not necessarily fake news. In Spanish, 'fake news' is almost synonymous to 'hoax' (*bulo*). Literally, *bulo* means "false news that is spread, generally, in order to harm someone" (RAE, n.d.). The most authoritative dictionary in our language, that of the Real Academia Española (RAE) defines it as "false news disseminated for some purpose". On the other hand, the Venezuelan Fake News Observatory (Observatorio Venezolano de Fake News, OVFN, 2019) explains that the term first appeared in 1853. In the original definition of *bulo*, the intent, the interest of someone to harm another is evident. The Fundación del Español Urgente (Fundéu, 2017) suggests Spanish speakers to understand the English adjective 'fake' as 'false' or 'counterfeit'. Other authors advise against the use of the term 'fake news', given the contradiction of linking a news item to a false nature.

Therefore, we agree with OVFN's Professor León Hernández, who defines 'fake news' as counterfeit' information or content, not news.

Fake news revolves around the action of disseminating counterfeit content presented in the form of any other item of news output. It seeks to pass itself off as legitimate on mainstream and social media, as well as websites, intent on being spread or made viral by appealing to the emotions of audiences. In this way, it stretches beyond the matter it addresses and intends to intimidate, cause hopelessness, or erode reputations.

In *Fake News: una Revisión Sistemática de la Literatura* (*Fake News: A Systematic Review of the Literature*), Parra and Oliveira indicate:

> It is becoming increasingly difficult to discern what is true from what is fake. The political, media-related, and social uses of concepts such as after truth or fake news is a global issue that threatens the entire population as a whole, the media, and the Internet itself. Evidently, the existence of fake news is nothing new, since the spread of unchecked information is as remote as our existence. (Parra and Oliveira, 2018, 1)

Researchers at Spain's Complutense University (Universidad Complutense) indicate that the true/false dilemma has been concurrent with the expansion of industrial journalism in the 19th century. They note several cases such as a publication back in 1835, from a series of six issues on the New York Sun, which warned about the existence of life on the Moon, a precedent of H. G. Wells's widely known work, *The War of the Worlds*. Subsequently, a young Orson Welles produced and performed this play with other colleagues in a Columbia Broadcasting System (CBS) radio studio on the night of October 30, 1938, the eve of Halloween. Other precedents of the phenomenon pointed to developing cases of xenophobia and religious intolerance, such as the publication among Philadelphia print media of untrue news items on Irish citizens stealing bibles from American public schools, which sparked public riots.

Fake news is a societal problem. Commenting on the study by researchers at the Massachusetts Institute of Technology (MIT) which showed that fake news items are 70% more likely to be shared, Spanish professor Manuel Blázquez-Ochando indicates that "fake news has alarmed the scientific community, which is beginning to question the

extent to which it is possible to recognize the truth in the information universe" (Blázquez-Ochando, 2018, 2).

The breeding ground of fake news is mass disinformation, often in a context where after truth prevails. In other words, they are "circumstances in which objective facts have less influence on the formation of public opinion than emotional appeals and personal beliefs", as noted by Fernández-García (2017). These circumstances are usually present during electoral periods, war scenarios, and economic, social, political, or health crises. This allows hoaxes to distract the public or sway public opinion and decision making

Venezuela's media ecosystem and its disinformation processes walk on a two-way street. There exist severe material, technological, and individual restrictions to access information. To this is added a government policy of information control and opacity, as well as a third growing scenario that includes the viral circulation of false content.

In Venezuela, the phenomenon of disinformation takes on important dimensions in a context of information restrictions and precarious conditions. At the 10th Congress of Venezuelan Communication Researchers (Investigadores Venezolanos de la Comunicación, InveCom, 2023), held in June 2023, during his keynote speech, researcher Andrés Cañizález blew the whistle on the denials of access to official data faced by researchers. In this regard, the sharply declining public data available, the meager submissions of government agency reports to the Legislative, the non-existent possibility of accessing official data or first-hand information provide a breeding ground for the spontaneous emergence of conjectures.

One of the tactics that encourage disinformation, with content created to harm intentionally, is what some platforms devoted to debunking fake content have called smear, vilification, or stigmatization campaigns:

> By means of them, attempts at contaminating information flows, sneaking in allegations that may be untrue or misleading – disinformation – with which they seek to sway public opinion. All of them have common factors; they are part of broader influencing operations that seek to cause damage to a specific target – a certain person, media outlet, political party, or organization. They are driven in no casual way: They use disinformation tactics, techniques, and procedures that generally leave

> digital forensic trail proving that they are orchestrated efforts. Moreover, although they sometimes arise from anonymous sources, by analyzing their traits and patterns resorting to concrete and irrefutable evidence, their promotion can be attributed to previously identified disinformation schemes. (C-Informa, 2023)

In this way, there is evidence of a systematic content output that not only attacks and harms personalities or institutions with inaccurate information, lies, tampered data, and errors, but also misdirects the attention of the public conversation towards fabricated, amplified, set up topics. In this way, the need for facts on relevant issues is disregarded, diminished, and overshadowed by a banal dissemination of orchestrated campaigns of deceit.

In a publication by the Coalición Informativa (C-Informa) partnership, composed by different Venezuelan news websites, communication researchers, and fact-checking platforms including *El Estímulo*, *Efecto Cocuyo*, Medianálisis, Cazadores de Fake News, and Probox, the kind of campaigns conducted by the government to monopolize the flow of contents and position issues has been documented and profiled (C-Informa, 2023).

Also targeting political parties, especially during election season, smear campaigns seek to erode the already weakened Venezuelan opposition, consequently "sowing discord and widening divisions among its different factions", with special interest in destroying the reputation of any alternative to the political project contrary to the ruling elite. In this way, the self-destruction of its main adversaries is promoted.

C-Informa highlights landmark cases of this type of fabrication of untrue information, its process towards becoming viral, and reach. The investigations of this partnership provide a means to expose those who replicate fake, fabricated, inaccurate, and decontextualized information. This kind of content aims at disturbing perception processes to persuade and weaken all those who are deemed as 'adversaries', or otherwise smear them. Concurrently, the use of anonymous boosters in stigmatization campaigns is also recurrent; in this case, they consist of accounts with poor identity data devoted to disseminating damaging content with the clearly stated intent of harming those targeted by them. In all instances reviewed, there prevails the use of tags and repeated phrases to boost topics and trends,

pin replicated content, and get it forwarded among their contacts.

The news partnership mentioned above also notes that to this list of tactics are added smear campaigns targeting journalists by fabricating content to link them to bogus corruption cases or different crimes. Fake profiles are also created in social media, impersonating their identities, to ridicule and make attempts to discredit them through contents in which they are portrayed as 'liars' and 'spin doctors for hire'. These are unfounded stigmatization campaigns, with untrue ideas, inaccurate links, and lack of evidence.

The NGO Transparencia Venezuela has documented how those who are devoted to fabricating and disseminating content to boost and promote the pro-government version operate. It also points out that "*Chavismo* has pioneered using bots and trolls as swarms of propaganda operatives on Twitter". According to the data released in investigations by Probox (Da Silva and Marín, 2023), almost 90% of the more than 200 million tweets on political issues were boosted by the Ministry of Communication and Information (Ministerio de Comunicación e Información, MinCI).

Although many of these messages are automatically disseminated by bots, there are also people who, for profit, spread content created to boost trends. The website *RunRunes* (2023) released findings on an 'online protest' of the so-called *Tuiteros de la Patria* (Tweeters of the Homeland), who receive monetary compensation for replicating biased, pro-government content on social media. In that case, the online protest was held demanding overdue fees, which confirmed that the dissemination of pro-government topics and trends is done for hire.

Consequently, Venezuelan disinformation is composed of particular ingredients that intensify its reach. In addition to misinformation, extensively profiled and studied by organizations such as Medianálisis, Provea, IPyS, and Espacio Público, there is the added dimension of government secrecy, obstruction to access information, concurrently with orchestrated campaigns from government entities – based on the restructuring of a media ecosystem governed by a hegemonic structure – to attack, stigmatize, and discredit any attempt of dissent.

In addition to a scenario where the government benefits from the lack of information by obstructing access to specific data and creating information gaps, there is also a crusade to construct a public discourse. This seeks to boost conversations, social media trends, and even fabricate content with digital tools (including artificial intelligence [AI]) that mimics 'news' unsupported by data. Such content should be treated with caution in the absence of empirical evidence.

One of the most controversial examples that sparked global scrutiny regarding the distribution of communication and information involved the use of AI to create a format that mimics a newscast, with data and content favoring and praising the government of Nicolás Maduro. The website Cazadores de Fake News (2023) released an analysis of this specific case. Domestic and international media focused on the use of this digital tool to create manipulated content.

The OVFN has identified a phenomenon in which topics supporting the pro-government stance were systematically made viral on Twitter, directly linked to accounts created to automatically disseminate content generated to like and boost trends – bots and personal profiles with specific tasks. The content's origin and the users or accounts responsible for its distribution were analyzed using the Hoaxy tool when applicable. The study indicates that these are not mere trends or organic conversations, but coordinated and driven campaigns with repeated strategies around different topics.

The viral online activity analyzed proves that pro-government trends are rarely spontaneous conversations (Rico, 2022). Instead, they exhibit characteristics consistent with automated and orchestrated campaigns designed to amplify specific topics, individuals, and trends.

The Probox website (2023) supplied valuable information on Twitter tag behavior and socio-political trends in Venezuela. In 2022, out of the 200 million tweets analyzed, only approximately 15 million pertained to non-pro-government trends. Additionally, the national government reached the highest average of messages disseminated by automated means. The study reports that Venezuela, Nicaragua, and Cuba have shared identical topics on at least 29 occasions. Probox asserts that "a handbook seems to be reportedly followed almost identically in these three countries, showing how their regimes contaminate and

manipulate information that they cannot directly control".

It is clear that pro-government forces have tampered with boosting topics, tags, and online 'discussions' as part of a disinformation campaign to distract from the consumption of verified and quality content. This deception includes spreading disinformation in the form of hoaxes.

The spread of false content is garnering increasing attention and contributing to the multifaceted practice of disinformation in Venezuela, as described above. Various local websites have been established to detect and debunk fake, inaccurate, manipulated, and decontextualized content. The contributions made by these initiatives include unveiling the characteristics of inaccurate, fraudulent, manipulative, and otherwise misleading content, as well as keeping record of debunked or confirmed news items. Indicators developed by these initiatives have exposed the components of hoaxes, facilitating a wider comprehension of their creation and objectives. For instance, they identify the interested parties behind false content, so that the public can discern the intended audiences of disinformation.

Hoaxes can arise from unverified mistakes or can combine truths with unverified interpretations and data. It is possible to decontextualize actual past events and present them as current, which constitutes counterfeit content. Studying the methods of eliciting certain reactions can facilitate the understanding of fraud.

The success of false content in drawing audiences' attention is attributed to its ability to appeal to emotions and generate immediate reactions. Purposes such as fueling fear, distraction, confusion, alarm, rejection, and obtaining private data to commit digital fraud are among the motives behind hoaxes. Patterns to validate beliefs, fears, or outrage are also prevalent. Even irresistible offers can serve as bait to catch the attention and achieve recirculation.

Understanding the connections between the indicators making up a hoax leads to a more comprehensive understanding of disinformation processes, which in turn provides means to fight its effects. This begins with the formation of opinions as content consumers in the digital age, as we face a constant deluge of information.

By way of Conclusion, Some Choices to Walk through the Maze

Amid controversial scenarios, with few options to access fact-checked, quality, rigorous, and accurate content supported by formal production processes, spaces are opening up to overcome the difficulties.

In the United States, effective solutions have been implemented to fight the constant use of disinformation, also known as 'fakecracy', in the short, medium, and long term, as Hernández (2020) explains.

Hyperlocal and offline journalism responses have been promoted to address information gaps or deserts in isolated communities with precarious internet access. This is necessary not only because such communities are often not part of the public agenda, but also because they face severe limitations in accessing news websites owing to fewer traditional media available as explained above.

Concerning the dissemination of false content or hoaxes, numerous websites specialize in detecting, debunking, and analyzing disinformation campaigns designed to massively disavow targeted personalities. Their efforts are based on thorough verification, contrast, and triangulation of reviewed content. Consequently, disinformation campaigns in Venezuela are constantly refuted.

Collaborative journalism initiatives among several media outlets jointly producing and disseminating news content have solidified the endeavor of reporters, along with digital structures to strengthen news websites (Viloria, 2022). In addition to improving content quality, these partnerships are more successful at countering attempts to prevent the dissemination of validated, fact-checked information. If an outlet is under attack, the other partnering media persist in releasing their jointly produced whistleblowing, hoax-debunking news items.

For the purpose of citizen oversight of this deluge of disinformation, digital literacy initiatives have also been promoted. They seek to develop digital skills to circumvent the obstacles of blockades and censorship imposed by the government. In this regard, they have aimed at educating on fact-checking processes, development criteria to consume content in an era of overwhelming connectivity.

However, the race against disinformation is uneven, and even more so in Venezuela. Although efforts to curb and fight disinformation effectively dismantle campaigns of lies and manipulation, they also promote developing criteria in content consumption and skills to use verification processes, coupled with constant rebuttals. Disadvantages to face the hoax production apparatus persist amid opacity, secrecy, and silence, plus the persisting and growing restrictions on access to free, plural, fact-checked and quality information. Meanwhile, the recipe for disinformation in Venezuela seems to have increasingly more ingredients.

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The roller coaster of disruptions and rapprochements between Venezuela and Colombia. A brief, prospective reflection

Francisco Javier Sánchez Chacón

In August 2022, Venezuela and Colombia resumed formal diplomatic and consular relations after an unprecedented disruption since February 2019. In September 2022, pedestrian passage, cargo and private vehicle transit was allowed or expanded after the historic shutdown of the formal crossing points on the common border in August 2015. The disruptions and closures imposed by Venezuela's president Nicolás Maduro are the result of governmental tensions with former Colombian presidents Juan Manuel Santos and Iván Duque. On the other hand, the realignment of relations and ties responds to current circumstances, namely the left-leaning ideological affinity

between Maduro and the new president of Colombia, Gustavo Petro. It can be stated that the distancing of the Venezuelan government from Colombia stems from the erosion of the democratic order and the increasing autocratic nature of the *Chavista* administrations. In turn, this is the cause of the political conflict in the country that has become chronic, inextricable, and multidimensional. As its resolution or permutation has been impossible to date, it has generated tragic consequences both in both countries and in the region, especially for Colombia, despite attempts in the form of multiple dialogue and negotiation mechanisms, all unsuccessful so far. On the contrary, with few exceptions, the current rapprochement and binational dialogue circumvents crucial issues for the world and Venezuela: Democracy, the rule of law, human rights, and the migration of Venezuelans into Colombia, which reaches 2.5 million people according to the June 2023 update of the United Nations' Interagency Coordination Platform for Refugees and Migrants (R4V, 2023).

For the last decade and a half, a whirlwind has engulfed the turbulent relations held by Venezuelan presidents Hugo Chávez and Nicolás Maduro with Colombian presidents Álvaro Uribe Vélez and Juan Manuel Santos. Also, a historical severing of ties with Iván Duque by Maduro and rapprochement with Gustavo Petro have been witnessed. All these fluctuations negatively affect the population and the different dynamics along a shared border of approximately 2,219 km (almost 1,380 mi), as well as the flow of Venezuelan forced to migrate who, in a proportion of 90% (6.6 million) have fled through that border, and of whom 75% (4. 9 million) have passed through the corridor between the State of Táchira, in Venezuela, and the Department of Norte de Santander, in Colombia. These percentages have been certified by the studies of [Universidad del Rosario's] Observatory on Venezuela and Konrad Adenauer Stiftung in Colombia (2019) and by the research of Marleny Bustamante and Francisco Sánchez for the Center for Border and Integration Studies of Venezuela (Centro de Estudios de Fronteras e Integración de Venezuela, 2022). Formal bilateral trade, primarily conducted across the land border, declined substantially from USD 7 bn in 2008 to USD 0.22 bn in 2020 according to Colombia's Ministry of Commerce (Ministerio de Comercio, Industria y Turismo, 2023). Harsh and constant tirades, as well as the disruptions and shutdowns, have left these territories, their peoples, and their interactions deprived

of effective governmental activity, and under a 'hybrid criminal rule', as underscored by Rodrigues *et al* (2022). This takes the form of rogue armed groups of diverse nature such as leftist insurgents (guerrillas), paramilitary groups, drug trafficking, transnational crime of human trafficking, common crime, and government officials of both countries. They overlap to different extents and impose a sort of *de facto* rule over people and goods.

In mid-2023, bilateral relations are in full swing: A frantic diplomatic activity with four presidential meetings in 10 months, international conference in Bogota focused on the Venezuelan crisis, concurrently with Venezuela's dialogue and negotiation process in Mexico, growth of formal bilateral trade closing at USD 728 m FOB in 2022 and USD 235 m FOB between January and April 2023 per figures from Colombia's Ministry of Commerce (2023). This is very favorable to Colombia given the Venezuelan economic debacle. In addition, Maduro's rule has become a guarantor of the peace process between the Petro administration and the National Liberation Army (Ejército de Liberación Nacional, ELN) guerrilla, the largest remaining rebel group in Colombia. For his part, the Colombian president is trying to build his leadership across the continent upon the Venezuelan crisis as part of his platform. To this end, he has been seen shaking hands with the president of Brazil, Luiz Inácio 'Lula' da Silva, while he remains tight-lipped regarding the root cause of the situation in Venezuela: The unapproachable political crisis created by the authoritarian exercise of power under *Chavismo*. All this helps Maduro rebuild diplomatic ties with a significant portion of the hemisphere: He has returned into the guest list of presidential summits; he has been invited to rejoin the Andean Community (Comunidad Andina, CAN); he is encouraged to return to the Organization of American States (OAS). However, Maduro backs down from this organization because it would imply accepting its continental human rights system which has issued numerous devastating rulings on his government.

Although formal bilateral relations, especially those of trade and consular nature, should have been preserved and should never have been severed, at this stage of readjustment and regarded prospectively for the purposes of sustainability, three fundamental conditions should be met for the sake of prioritizing democracy and human rights: 1) Recognizing the political conflict in Venezuela as caused primarily by

the undermining of democracy, i.e., the increasing autocratic nature of the *Chavista* regime. Otherwise, resuming relations normalizes authoritarianism; 2) Recognizing consequences of this conflict, essentially a complex humanitarian emergency with massive human rights violations, including crimes against humanity being committed, as reported by the United Nations (UN) and the ongoing case filed with the International Criminal Court (ICC), evident in the largest forced migration worldwide in the absence of a military conflict or a natural catastrophe, yet with regional repercussions, as well as increasingly frail government bodies on the verge of a failed state, among others; 3) Respecting sovereignty and the principle of self-determination is fundamental in international law; but their irreplaceable component is human rights and democracy, as established in the Inter-American Democratic Charter. Complying with the former conditions and not the latter opens the door to normalize and treat atrocities from a relativistic perspective under the guise of not meddling in domestic affairs. Respect for sovereignty in Venezuela means restoring the authority of the Sovereign, i.e., the Venezuelan people, to choose and determine their destiny (Sánchez & Alfaro, 2022). These fundamental conditions are to be met by all stakeholders, not only political operators, but also business, social, and academic groups, in short, the whole civil society, for its role in constructing truly democratic and thriving national societies, so that their common ties and dynamics can be fairly sustained and intensified.

In the case of Venezuela and Colombia, their inescapable proximity, rich common history since the pre-Columbian era, increased during the colonial period, and intertwined in the republican principles of the short-lived confederated Greater Colombia and the enormous fabric of relations held since the beginning of its offshoots as standalone nations, Colombia and Venezuela, since 1830, compels their governments and civil society to understand each other without leaving aside the needs and realities of their national societies and their peoples for petty or ideological agendas. Citizens are the ultimate beneficiaries of successful public policies or the victims of authoritarian drifts and armed conflicts. Albeit widely known, in these times and for the future, it is worth reminding this: Peace in Colombia relies on Venezuela and, in turn, peace in Venezuela is necessarily linked to that of Colombia.

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Back to the Andean Community: A temporary solution towards the migratory regularization of Venezuelans?

Claudia Vargas Ribas

Introduction

The Andean Community (CAN) is an integration mechanism for countries in the South American region established in May 1969 through the so-called Cartagena Agreement, with the main objectives of "promoting the balanced and harmonious development of the Member Countries under conditions of equity, by means of integration and economic and social cooperation [...] strengthening subregional solidarity, and narrowing the existing development gaps among the Member Countries", conducive to an improvement in the standard of living of their inhabitants (Cartagena Agreement, Art. 1).

Currently, it is formed by Bolivia, Colombia, Ecuador, Peru as full members, and so-called associate members such as Argentina, Chile, Paraguay, and Uruguay. Venezuela was formally part in full right of this mechanism from 1972 until 2012, when it announced its withdrawal after 33 years of relationship in 2006.

CAN as an integration scheme for Venezuela

For multiple reasons, Venezuela became one of the destination countries of Andean migration in the 1970s (to varying extents and at different periods). In this way, the citizens of other countries in this region sought economic and social wellbeing. This trend was consolidated in such a way that Venezuela's National Institute of Statistics (Instituto Nacional de Estadística [INE], 2001)[1] census indicated that 66.5% of the foreign population in the country came from Andean countries, primarily Colombia.

Based on the above, from a conceptual standpoint, it is worth underscoring that this phenomenon of mobility and migration of view preceded the Andean framework. Furthermore, we could presume that a good part of its purpose and regulatory system has sought to address this trend, not only regarding migration but also a history of relations and closeness among citizens (and governments) of these member countries.

CAN's Migration and Human Mobility scheme addresses this very suitably. Therein, we find a series of provisions such as Decision 878, establishing the Temporary Andean Residency (up to two years) and Permanent Andean Residency. Both benefits are part of a broader framework of principles for citizens of member countries that include protection of rights, non-discrimination, prohibition of criminalization, treatment as nationals, family reunification, right to education, participation in local elections, and transfer of remittances. The CAN also seeks to support its Andean citizens in third countries through the Andean Cooperation Mechanism on Consular Assistance and Protection and Migratory Affairs (CAN Decision 548, CAN Order 1546).

On the other hand, its rules on services trade establish principles of market access and treatment as nationals for professionals from member countries who provide their services online and on a face-to-face or temporary basis. Along with developments in the accreditation of college degrees, this option creates greater opportunities for Andean citizens to remain in these countries as they seek to practice their professional field. It also encourages the use of this human and intellectual capital, a benefit unavailable to citizens of Venezuela, a country withdrawn from full membership in this agreement.

Regarding goods trade figures, they show that Venezuela's performance within the CAN was very positive and, alongside the United States, it was the main destination of private sector exports, those with higher added value and for a longer period. This can be seen in Table 1. In fact, between 2003 and 2006 (years prior to withdrawing from the treaty) the CAN represented 24% of Venezuela's non-oil private exports and, from 2007 to 2011 (transition to withdrawal), 21%.

Destination of Private Sector Exports						
Year	2003	2004	2005	2006	2007	2008
CAN	23%	22%	24%	29%	28%	22%
US	35%	37%	29%	22%	19%	20%

Table 1. Destination of Venezuela's private sector exports. Source: Prepared by author based on ITC's Trade Map data.

In the case of Venezuela, the economic and social affinity with the countries of the Andean region, the benefits of a system of regulations and its uniform interpretation were factors that allowed an even deeper integration in investments, industry, trade, and services: If this paper's scope allowed itemizing services trade figures, which are under-recorded and include professional services rendered, both online and temporary, we would further confirm the relevance of this integration. Furthermore, stemming from the consensus among the parties (which includes the broad participation of the private sector), its rules have a significant legitimacy, being – in our opinion – one of the most advanced among the integration mechanisms across the continent.

Venezuelans in CAN countries today

Currently, 62% of Venezuelans abroad are in the Andean countries, the main destinations being Colombia, Peru, and Ecuador (in that order). This trend starts to surface as of 2016. That year, among other factors such as the economic and political crisis, the decline in Venezuela's living conditions triggered a massive migration primarily headed for these countries in the region because of historical ties, geographical proximity, and cultural affinity. Another reason has been that, until then, there had been no entry restrictions. An estimated 2,791,212 people emigrated from Venezuela between late 2016 and 2018 (R4V).

In 2019, Peru and Ecuador established visa requirements for Venezuelans' entry, seeking a way to control this flow. However, the effect generated was the opposite, thereby increasing the number of people under irregular status and therefore different consequential impacts: Labor informality, difficulty to access utilities (housing, health, food), increased poverty, risk of labor exploitation, trafficking, discrimination, and xenophobia. Currently, Venezuelans in an irregular situation across Latin America and the Caribbean (LAC) reach 34.3% and, in the case of CAN countries, 36.6%. When we analyze this last variable by country, we find that, from across the region, Peru (68.9%) and Ecuador (59.7%) host the highest percentage of Venezuelans without any residence permit or regular status granted (R4V, June 2023).

A study published by the Inter-American Development Bank (IDB) in January 2023, entitled *La regularización / normalización migratoria: oportunidades y desafíos para la integración de la población migrante en América Latina y el Caribe (ALC) (Migration Regularization / Normalization: Opportunities and Challenges for the Integration of the Migrant Population in Latin America and the Caribbean* [LAC]), indicated that, between 2000 and 2009, there were some 21 regularization processes in the region vs. the 51 performed from 2010 to 2019, 14 additional ones in the last two years, plus those implemented under regional agreements or regulations as the Common Market of South [America] (Mercado Común del Sur, Mercosur) and the Andean Statute. It is particularly striking that, in the 2015-2019 period, outside of the Andean Statute (valid only for CAN members), LAC countries have been precisely the ones that have had to implement them the most. One of the reasons is the massive arrival of people from

Venezuela, a non-full member outside the CAN, who consequently require other regularization alternatives of some kind.

The same study noted that the regularization mechanisms are extraordinary. In other words, based on current migration regulations or exceptional legal procedures, they are implemented to give regular status to foreigners and, in "practical terms, they allow migrants to obtain a permit to temporarily reside in the country, work and, in some cases, access health and education services" (Van der Werf & Rivera, 2023:5).

Another study conducted by the Migration Policy Institute (MPI) released in May 2023 confirms the above. According to that research, the result of the methods of regularization implemented by 15 LAC countries between 2016-2022 has allowed granting legal status to people coming from Venezuela. However, its findings show that they are disparate and uncoordinated among countries: They are *ad hoc* measures; the requirements imposed on Venezuelans in the largest host countries are cumbersome to comply with, and restrict their mobility and family reunification processes; in addition, although many of these measures allow access to certain educational levels, health services (especially emergency), hurdles to effectively exercising fundamental rights persist (Gandini & Selee, 2023).

It must be said that, with their limitations, each country has tried to expand regularization choices beyond the existing ones such as visas, asylum / refuge petitions, or those addressing family reunification; but these are transitory initiatives that grant a limited regular status and prevent full integration, thereby restricting access to rights for them and their families.

Table 2 shows the number of Venezuelans living in each of these host countries, the regularization measures adopted, and the entry requirements set. The most notorious finding is that, of the three, Colombia has taken the most far-reaching steps in terms of regularization through the Temporary Protection Statute for Venezuelans (Estatuto Temporal de Protección para Venezolanos, ETPV). Even so, it is a progressive regularization scheme, not immediate and subject to approval; those eligible are limited to groups with certain arrival dates and periods; this leaves out those who entered before by irregular means

or those who enter after the date established. It is not an instrument of international protection, i.e., the person may move and return to Venezuela, be eligible for deportation and, in its definition, does not specify the potential extent of vulnerability of refugee status; finally, it provides that petitioners may seek residence in the following 10 years, against the two years established by the CAN for approval of definitive status for citizens of member countries.

In the case of Peru, we notice that that it is the country in the region with the highest number of asylum petitions resulting from entry restrictions in 2019, since this was considered one of the few choices available to Venezuelans found to obtain some type of protection or defined migratory status. Initially, in Peru, temporary schemes have been established (which have also regularized this population under certain conditions), so have fines and very costly procedures to obtain documents, along with requirements difficult to comply with because the social and labor vulnerability inherent to the – irregular and poorly defined – migratory status of Venezuelans at present. At the time of submission, only 31.1% are in regular migratory status and only 4.8% have been granted asylum protection (R4V, June 2023).

For its part, Ecuador made available a Union of South American Nations (USAN) visa at a cost of USD 250, but only valid until 2021 due to its withdrawal from the intergovernmental organization. Between 2019 and 2022, it implemented other regularization measures such as the Temporary Exception Residency Visa (Visa de Residencia Temporal de Excepción, VIRTE) with several tiers: The first two for Venezuelans and other foreigners who entered regularly, and then a third for irregular immigrants; by April 2023, more than 40,000 had been approved (Gandini and Selee, 2023).

Country	Qty of Venezuelans	Venezuelans under Regular Status	Refuge Petitions	Refugee Visas Granted	Regularization Policies Implemented	Entry Requirements for Venezuelans
Colombia	2,500,000	2,200,000	26,800	1,200 (4.8%)	6 ETPV processes intended for Venezuelans (10 years)	None
Peru	1,500,000	467,100	531,600	4,300 (0.8%)	Temporary Stay Permit (Permiso Temporal de Permanencia, PTP) PTP holders are granted a PTP Card (Carné de Permiso Temporal de Permanencia, CPP) Humanitarian Permit	Humanitarian Visa (June 2019)
Ecuador	502,200	202,500	6,600	1,200 (8.3%)	Regularization process by means of VIRTE visas	Humanitarian Visa (August 2019)

Table 2. Overview of key regularization measures implemented by the main recipient CAN member nations. Source: Prepared by author with information from R4V and MPI report (Gandini & Selee, 2023).

How may the CAN address the regularization of Venezuelan nationals? Closing remarks

Most of Venezuelans abroad are in Andean region countries. Moreover, among each of the millions of personal and family decisions that have led them to a destination is the recognition of social affinity, reinforced by common geography and shared history. Therefore, Venezuela's return to the CAN is imperative. Although, in the last two years following the COVID-19 pandemic, Venezuelans have sought new migratory destinations from their home country or from these host countries – one of the causes being the lack of migratory regularity or possibilities to assimilate, it is also clear that those who have been able to stay are – or will be– making efforts for family reunification and access to more stable, lasting mechanisms towards a regular status, as well as planning for the long term.

Once in the CAN, Venezuelans, again Andean citizens, could undergo a temporary transition scheme towards full recognition of their rights within a broader framework of principles established in the migration and mobility system of this organization. A transition to Andean

citizenship for Venezuelans in the region would be a temporary solution to the problem of Venezuelan migration and would barely mitigate the existing conditions of Venezuelans in these countries [2].

Venezuela also needs to rejoin the CAN for other reasons, mostly economic. As indicated above, Venezuela's period of largest value-added goods and services export and trade matched its CAN membership. Let us remind that, as explained in social issues, economic identity facilitates the complementarity that allows for deeper integration.

Today, Venezuela's economy is only a fraction of its size when it joined the CAN (then Andean Pact) in 1972. Consequently, it must temporarily request and receive special and differential treatment. We believe that it is time for the stakeholders involved to address the problem and jointly make use of the existing mechanism, as this will provide the temporary relief proposed and even pave the way for a comprehensive and permanent solution.

Venezuela's reincorporation into the CAN is part of this comprehensive and permanent solution. Although Venezuela's economic figures for the last 10 years show a decline unprecedented in its history, diminished capabilities still exist, as shown by the exports of value-added products to the European Union (EU) and North America. Despite such adverse conditions, it competes in the most challenging markets with increasing success. A productive economy oriented towards exports of goods and services, supported by Andean investments relying on temporary comparative advantages and above all competitive advantages, could contribute to the first steps to recover and, thereby, retain and, above all, attract the return of talent. This is the basis for a comprehensive and permanent solution to the problem of Venezuelan migration.

The concrete approach in the short term is to go towards lasting alternatives transcending political changes and junctures of countries in the region, aiming towards a migration policy regularly respecting human rights and guaranteeing mobility – in principle. The purpose of this would be to reduce vulnerabilities, prevent international organized crime targeting migrants, eliminate discrimination, recognize the talent and contributions of transients, and promote international cooperation.

With the above, we do not intend to ignore the complexity of the current Venezuelan situation nor much less of its migrant nationals in these countries. Therefore, we insist that this is something temporary and partial depending on many factors. Even so, we believe that it is a feasible proposal to be considered by different regional and national stakeholders that, for the reasons described here, could gradually represent an advantage for Venezuela, while we know that a definitive or large-scale solution for the future entails the resolution of the internal situation and the return to democratic rule.

NOTES

1. According to the 2001 Population and Housing Census of Venezuela, there were 1,015,538 foreigners in the country, of which 675,506 were from CAN member countries (Bolivia: 1814, Colombia: 609,196, Ecuador: 28625, Peru: 35871).
2. It is worth noting that knowing the detailed scale of the scope would be the object of a more specific study on the characteristics of these people, migratory status, socioeconomic situation, and requirements to complete procedures, in addition to a background analysis on how a negotiation for the return from Venezuela and the conditions in the migratory issue could be.

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The Venezuela-Guyana controversy over the Essequibo

Sadio Garavini di Turno

In 1962, given the announced imminence of Guyana's independence within the framework of the British decolonization process in the Caribbean, Venezuela reactivated its claim over the territory of the Essequibo Guyana, stripped by Great Britain in the unjust Arbitral Award of 1899. After 4 years of negotiations, on February 17, 1966, Venezuela, Great Britain, and British Guiana, which upon independence acquired the name Guyana, signed the Geneva Agreement. From that date, Venezuela's claim to the Essequibo territory has as its fundamental legal and political framework that treaty.

The Agreement establishes the need to "seek satisfactory solutions for the practical settlement of the controversy, arising as a result of Venezuela's contention that the Arbitral Award of 1899 on the border between Venezuela and British Guiana is null and void." Guyana has always asserted that the purpose of the Agreement is to establish the

validity or nullity of the Award, while Venezuela, for its part, has argued that it makes no sense to propose a "practical and mutually satisfactory" solution to a strictly legal controversy. The Geneva Agreement also mentions that the UN Secretary-General, if the parties fail to agree on any settlement, may decide which of the peaceful means of dispute settlement provided for in Article 33 of the UN Charter should be used. Since the signing of the Agreement in 1966, the International Court of Justice (ICJ) has been Guyana's preferred method.

Since 1989, bilateral negotiations have been assisted by a "Good Officer," appointed by the UN Secretary-General, without reaching any agreement. In late 2013, with the onset of the "oil era" in Guyana and after the detention, by the Venezuelan Navy, of a seismic exploration vessel, the Guyanese government stated that, considering that the Good Offices process had yielded no results in 25 years, it proposed, to finally end the controversy, that the Secretary-General opt to bring the case to the ICJ. The Maduro government negligently insisted on continuing the Good Offices instead of proposing another means of settlement, such as Mediation or Arbitration "ex aequo et bono," for example. This led to two UN Secretaries-General, Ban Ki-moon and Antonio Guterres, in agreement with the latest Good Officer, Norwegian Dag Nylander, deciding to select the International Court of Justice (ICJ) as the means to resolve the controversy. The Court, against the Venezuelan position, has decided that not only does it have jurisdiction to settle the controversy, but the issue to be determined is the validity and invalidity of the 1899 Award.

The lack of professionalism and irresponsibility of the governments of Chávez and Maduro have led to the worst possible scenario for Venezuela. President Chávez, with Maduro as Foreign Minister for 6 years, perhaps influenced by Fidel Castro, who always supported Guyana and the desire to secure the votes of Caribbean countries in the OAS and the UN, practically abandoned the claim. In 2004, Chávez declared that Venezuela did not oppose Guyana unilaterally granting concessions and contracts to transnational companies in the Essequibo if it favored regional development, thus ending almost 40 years of Venezuelan diplomacy and unilaterally handing over, for nothing in return, one of Venezuela's few negotiation cards. To make matters worse, in 2007, he asserted that the reactivation of Venezuela's claim over the Essequibo territory in 1962 was the result of pressure

from the United States, supposedly interested in destabilizing the left-wing "government" internally autonomous but still dependent on Great Britain, the Prime Minister of British Guiana, Cheddi Jagan. This is an absolute historical falsehood, probably caused by Chávez's hyperbolic "ideological blindness," but it delegitimizes the claim itself. Guyana's then Ambassador to Caracas, Odeen Ishmael, in an interview with the newspaper El Nacional, relying on that presidential declaration, stated that President Chávez should "take a step forward to withdraw the Venezuelan claim."

Venezuela has until April 8, 2024, to submit its "counter-memorial" to Guyana's lawsuit. The vast majority of legal experts specializing in the subject affirm that Venezuela, as a member of the UN, respectful of the UN Charter and International Law, must prepare, with the support of the best national and international experts, to defend in court its position that the 1899 Award is null and void.

In the Maduro government, regarding the Essequibo issue, there were those who believed that Venezuela should defend itself in court, and indeed Venezuela appointed an ad hoc judge and filed a motion for inadmissibility of Guyana's lawsuit, thereby agreeing to participate in the process. However, after the Court rejected the motion, the government sector that maintains that an "anti-imperialist" ideological "narrative" must be adopted and accuses the government of Guyana and the ICJ itself of being puppets of EXXON has definitively strengthened. Forgetting, "curiously," that EXXON's partners in Guyana are the Chinese National Oil Company (CNOOC) and CHEVRON, which operates in Venezuela. This position is extremely irresponsible, in addition to being unserious. The Court, with or without Venezuela's presence, will continue the process and in a few years will render its judgment, which is mandatory and unappealable. Additionally, it should not be forgotten that, after the decision on the 1899 Award and the definition of the land border, it is very likely that the ICJ will also have to intervene in the delimitation of marine and submarine areas. Indeed, it must be emphasized that, regardless of the Essequibo claim, in the hundreds of thousands of square kilometers of the Exclusive Economic Zone and the Continental Shelf projected by the Venezuelan territory of the Orinoco Delta, there are immense oil and fishery resources, and Guyana has arbitrarily granted vast concessions to transnationals that include marine and submarine areas

projected by both the Essequibo territory and the Venezuelan state of Delta Amacuro.

The Maduro government, following the position of the "anti-imperialist" sector, decided to convene a consultative referendum on December 3, 2024, regarding the controversy. Of the five questions presented to the electorate, two are absolutely inconsequential and are equivalent to asking: "Do you love your mother?" In the question asking the people whether they support the 1966 Geneva Agreement as the sole instrument for resolving the controversy, the regime conveniently forgets to mention that we are in the ICJ process because two UN Secretaries-General, the last "good officer-mediator," and the ICJ itself interpreted the Geneva Agreement in such a way that the UN Secretary-General had the authority to bring the case to the ICJ. The question asking whether to agree not to recognize the jurisdiction of the ICJ to resolve the controversy obviously shows that the government sought "popular ratification" to withdraw from the process initiated in the ICJ. In the last question, the possibility of creating a new Venezuelan state in the disputed territory, incorporating it into Venezuela's map, and preparing an accelerated plan to grant citizenship and all the "services" of the Venezuelan state to the Essequibians was raised. An evidently unrealistic question, which has also provided a basis for Guyana, CARICOM countries, and the Commonwealth, among others, to denounce to the international community that Venezuela intends to militarily occupy the region. It is unrealistic, among other things, because it is ridiculous to think that the Essequibians, who live in the world's fastest-growing economy, would be interested in the citizenship of a country in full socioeconomic disaster from which over 7 million inhabitants have emigrated in a few years, 35,000 of them to Guyana itself. To make matters worse, after convening this referendum, the Foreign Ministry, in a very unserious official statement, after asserting that the Guyanese government is a puppet of EXXON and the US Southern Command, asks the same government to sit down for bilateral negotiations.

It was essentially a maneuver for domestic politics to distract public attention from the enormous socioeconomic failure, given the announced elections of 2024, while waving the nationalist flag. Furthermore, it also sought to make people forget the irresponsible and unprofessional handling of the controversy for over two decades.

The tension generated by the referendum and some Venezuelan military movements created the conditions for CELAC, CARICOM, and Brazil, in particular, to organize a meeting between Presidents Maduro and Ali in Saint Vincent and the Grenadines, which concluded with the signing of the Argyle Declaration on December 14, 2023, where the parties committed to peacefully resolve their differences through a process of diplomatic dialogue. However, in both this meeting and the subsequent one between Foreign Ministers Hugh Todd and Yvan Gil, the statements say little, except that the parties agreed to continue talking and that in the next meeting each party will present the topics they want to discuss. However, listening to their statements at the end of the meetings, it is evident that the parties are entrenched in two mistaken monologues, where, as Octavio Paz said: "we never hear what the other is saying or, if we hear it, we always believe they are saying something else." Indeed, both President Ali and the Guyanese Foreign Minister reaffirmed with extreme clarity that, for Guyana, the Essequibo controversy will be resolved in the International Court of Justice, and it will not participate in any other means of dispute resolution until the ICJ decides on the matter. In the meantime, it is willing to discuss all other topics of interest to the two neighboring countries. Maduro and Foreign Minister Gil, on the other hand, hinted that the meeting was a diplomatic victory for Venezuela and that dialogue was, in practice, the reopening of a bilateral negotiation on the controversy.

The highly influential think tank, the Center for Strategic and International Studies (CSIS) in Washington, has published an extensive and detailed report on the current situation of the controversy between Venezuela and Guyana over the Essequibo territory. The CSIS, using satellite photos as evidence, asserts that the Maduro government is reinforcing and expanding its military capacity on the border with Essequibo, a territory under Guyana's administration and control. According to CSIS researchers, the Venezuelan government's strategy combines the "carrot" of diplomatic dialogue, initiated with the Argyle Agreement, with the "stick" of the threat of potential military action. A strategy that the academic Thomas Schelling, who applied game theory to international conflicts, coined with the neologism "compellence". The goal would be to pressure Guyana into reopening bilateral negotiations on the Essequibo controversy.

More recently, President Maduro has reaffirmed that his government definitely does not recognize the jurisdiction of the International Court of Justice (ICJ) to resolve the controversy with Guyana over the Essequibo territory. He says that the ICJ is controlled by the United States and the European Union, that Venezuela rejects the "judicial colonialism" of the West, and that the only way to resolve the dispute is through the Geneva Agreement (GA). Perhaps it is worth mentioning that the 15 judges of the ICJ are elected by the UN General Assembly and that they currently represent the following nationalities: China, Russia, Mexico, Japan, Brazil, India, Morocco, the United States, Somalia, New Zealand, the United Kingdom, Italy, Uganda, France, and Slovakia. The Maduro government tries to confuse public opinion when it repeats that the process already activated in the ICJ is contrary to the GA, when in reality, as we have already explained, we are in the ICJ because of the decision of two UN Secretaries-General, the last "good officer-mediator," and the ICJ itself. Maduro claims that Venezuela has never accepted the jurisdiction of the ICJ. However, former Foreign Minister Ignacio Iribarren Borges, in his speech to the National Congress on March 17, 1966, in the discussion of the Approving Law of the GA, mentioned that Venezuela, during negotiations with the United Kingdom, "proposed that the function of choosing the means of settling the dispute be entrusted to the ICJ." When Great Britain objected, it was agreed to "entrust that function to the UN Secretary-General." Finally, Iribarren says: "in accordance with the terms of Article IV of the GA, the so-called Award of 1899, in the event of no satisfactory solution for Venezuela, must be reviewed through arbitration or **judicial recourse**." Certainly, it would have been much better for Venezuela to go to arbitration "ex aequo et bono," where the arbitrators act as "friendly mediators" and seek a satisfactory solution for both parties.

Maduro has irresponsibly decided not to defend our rights in the ICJ. In a few years, the Court will render its judgment. Maduro claims that he will not respect that judgment and that Guyana will be obliged to negotiate with Venezuela. Guyana will negotiate, particularly the delimitation of marine and submarine areas, but in the light of a judgment from the ICJ in its favor and the support of the vast majority of the international community. Certainly, Brazil, China, and India, as well as the US, the EU, the UK, and Canada, among many others, are

already increasing their investments in Essequibo and in general their trade and cooperation agreements with Guyana, the fastest-growing economy in the world.

Guerra Fría 2.0: Claves para entender la nueva política internacional

Aguirre, M. (2023). Guerra Fría 2.0: Claves para entender la nueva política internacional. Barcelona: Icaria Editorial. 230 páginas.

Este libro guía al lector en un recorrido que explora los principales asuntos globales y las perspectivas contrastantes sobre ellos. Gracias a su carrera multifacética en los ámbitos del periodismo, la investigación y la acción por la seguridad y la paz, Naciones Unidas, fundaciones y think-tanks (entre ellos el Transnational Institute), el autor nutre su libro de una amplia variedad de experiencias y vínculos. Su libro refleja ese conocimiento y experiencia, recurriendo a una amplia gama de perspectivas de otros observadores y de las discrepancias entre ellos. Los diez capítulos de los que consta el libro se construyen, en gran medida, en base a algunas de las publicaciones más importantes del autor, con modificaciones y actualizaciones para tener en

cuenta a la guerra de Ucrania, la guerra económica focalizada en China y la emergencia climática, entre otros conflictos cada vez más intensos que, en conjunto, quizás nos conduzcan (o no) hacia una situación semejante a la Guerra Fría que finalizó hace treinta años.

A continuación se esbozan unos resúmenes seleccionados, y por ende de ninguna manera completos, de los capítulos del libro.

El capítulo inicial, "De la Guerra Fría a la globalización", traza las líneas discontinuas de la Guerra Fría durante las décadas que siguieron a 1945, enfocándose especialmente en el vuelco de una competencia entre estados basada en la ideología a otra basada en el rendimiento económico, la erosión de la supremacía estadounidense y el desplazamiento del consenso político interno por la polarización. Lo que es aún más inquietante es la similitud con la antigua Guerra Fría, reflejada en la intensificación del despliegue armamentístico, las nuevas tecnologías y las intervenciones armadas unilaterales. Los movimientos progresistas, especialmente cuando logran ejercer una influencia real sobre la política o la opinión, son motivo de cauto optimismo, pero a menudo esos movimientos han sufrido contratiempos graves, como el avance en muchos países de movimientos nativistas y chovinistas bien financiados.

El siguiente capítulo, "Un solo sistema mundial", comienza presentando las características que distinguen al sistema internacional actual del que prosiguió a la Segunda Guerra Mundial. Todas ellas se ven influenciadas por la noción de que el capitalismo ya no se enfrenta a un rival que opere siguiendo unas líneas político-económicas fundamentalmente diferentes, concepto que el historiador Immanuel Wallerstein, entre otros, señaló como insostenible. En cualquier caso, el hecho es que muchas millones de personas, –la mayoría en lugares no occidentales– perecieron en guerras promovidas en nombre de dos sistemas rivales. En el conflicto actual en torno a Ucrania se detecta cierto parecido con la antigua Guerra Fría. Mientras tanto, los riesgos de proliferación nuclear siguen creciendo, agravados por la llegada de sistemas de armamento automatizados y rapidísimos. Todo ello plantea graves desafíos para los esfuerzos, cada vez más debilitados, por el de control de armamentos.

El tercer capítulo, "Multipolaridad y poderes emergentes",

explica el paso de un orden mundial bipolar dominado por Estados Unidos, a otro incipiente compuesto por grandes potencias con capacidad global –Estados Unidos, China y Rusia– y potencias de menor importancia global o regional como la Unión Europea, India, Irán, Arabia Saudí y Turquía. Se citan numerosos estudios recientes de especialistas nacionales y regionales que sugieren la necesidad de cuestionar los conceptos de "potencias emergentes" potencialmente interesadas por una solidaridad y un no alineamiento anticuados, frente a las grandes potencias. Este debate sirve como introducción al cuarto capítulo, "Las grandes potencias y el sur global". En él se examinan los factores que causan la debilidad de los Estados y los conflictos internos, especialmente los promovidos desde el exterior en guerras por poder y los configurados en la actualidad, no por cruzadas ideológicas, sino por la lucha por recursos.

El quinto capítulo, "Estados Unidos, crisis interna y de liderazgo", comienza con un resumen de las problemáticas del país, como la creciente desigualdad, un sistema constitucional decadente, la violencia, la política que gira en torno al dinero, las "guerras culturales" y la incipiente pérdida del monopolio de la violencia por parte del Estado. Después, el capítulo se centra en las fuerzas que dirigen las políticas exteriores de Estados Unidos, o que las descuidan en medio de estridentes peticiones de atención en el frente interno. Señala que, dejando la retórica de un lado, las políticas adoptadas por la administración Trump (como las relativas a Israel y Palestina) no han cambiado notablemente bajo el mandato de Biden, aunque éste ha abandonado el discurso de la "retirada" y ha proclamado que "¡América ha vuelto!". De hecho, Estados Unidos vuelve a reivindicar su "liderazgo" y un "orden basado en normas", pero ahora en un mundo mucho menos dispuesto a dejarse guiar por Estados Unidos y sus normas egoístas. El capítulo concluye con la dura guerra económica que Estados Unidos le está haciendo a China, sobre todo en torno a los semiconductores: la "guerra de los chips".

El capítulo seis, "China: hacia la consolidación de gran potencia" expande el tema del capítulo anterior sobre las relaciones entre China y Estados Unidos, explicando su historia, la espectacular emergencia de China, pasando de ser una semiautarquía

a crear una interdependencia e influencia masivas en el resto del mundo. El capítulo explora una serie de contradicciones, contracorrientes y riesgos que se avecinan ahora que Estados Unidos se enfrenta por fin a una competencia seria y a posturas cada vez menos cooperativas por parte de antiguos aliados occidentales y "del sur".

El capítulo siete, "Rusia, un gigante militar con debilidades", comienza recordando al lector la razón por la que los líderes rusos durante años priorizaron la seguridad nacional por encima de todo lo demás. Luego revisa las numerosas causas de la debilidad rusa: atraso económico y tecnológico y falta de cohesión social, todo ello agravado por las "reformas" postsoviéticas que enriquecieron a la nueva clase de la oligarquía, con ayuda de muchos "facilitadores" en jurisdicciones occidentales.

El capítulo ocho, "Un mundo de desafíos para la UE", plantea de inmediato una pregunta clave: ¿podrá la UE lograr algún día una autonomía estratégica con respecto a Washington D.C.? La guerra en Ucrania plantea esta pregunta con más urgencia que nunca. Dentro de la propia UE surgen otros desafíos: las prerrogativas nacionales frente a los imperativos de la Unión (una cuestión más controvertida que nunca debido al ascenso de los miembros de Europa del este como consecuencia de la guerra); la claridad y la coherencia entre los órganos consultivos y políticos de la UE; las lagunas y contradicciones en las relaciones exteriores; y la coherencia política y la legitimidad pública socavadas por la adhesión a las ortodoxias neoliberales.

La problemática que plantea el título del capítulo nueve, "¿Una seguridad diferente?" se presenta en el desesperanzador contexto de una militarización, con su lógica estratégica y económica, más fuerte que nunca, a pesar de que conduce a desenlaces aún más destructivos y contraproducentes. En este capítulo, Mariano Aguirre se encuentra en su ámbito profesional natural, y puede recurrir a décadas de participación profesional en debates, investigación y acción por una paz y una seguridad auténticas. Llama la atención sobre las importantes voces que reclaman nuevos enfoques dirigidos a la prevención de conflictos y a la erradicación de sus principales causas. En el contexto de una nueva guerra fría, las perspectivas de tales opciones serían poco prometedoras.

El décimo y último capítulo, "El futuro", acerca de nuevo al lector a los principales problemas de una democracia debilitada y una reducida legitimidad de la gobernanza, tanto dentro de los estados como entre ellos. Además, analiza la persistencia de la pobreza en muchos lugares y el aumento de la desigualdad doméstica que se está dando en casi todo el mundo. La competencia por los recursos materiales agudiza las tensiones, desencadenando aún más reflejos desestabilizadores y militarizados en nombre de la estabilidad y la paz. En medio de estas complejas amenazas, solo se detecta un pequeño resquicio de luz. Al igual que en el primer capítulo, en el último el autor destaca el potencial de la protesta social progresista frente a las ortodoxias políticas que favorecen a los ricos y los sistemas extractivos insostenibles que dañan fatalmente el medio ambiente. La urgencia de tomar acción política constituye el mensaje final.

En este libro ampliamente referenciado, Mariano Aguirre presenta una visión general, rigurosa pero matizada, de las fuerzas que actúan en el mundo actual y de los argumentos empleados en nombre de esas fuerzas. Presenta numerosas razones para oponerse a tales argumentos y rebatirlos con propuestas alternativas, por lo que merece la atención de publicistas, estudiantes de asuntos globales y lectores del público general.

David Sogge

La matriz sociopolítica en América Latina: Análisis comparativo de Argentina, Brasil, Chile, México y Perú

Marcelo Cavarozzi, Peter Cleaves, Manuel Antonio Garretón y Jonathan Hartlyn. 367 páginas.

Este libro tiene como antecedente América Latina en el siglo XXI: hacia una nueva matriz sociopolítica, publicado por esta casa editorial en el año 2004. Ahí se documentaron tendencias significativas en Latinoamérica y se introdujo el concepto de <matriz sociopolítica> como un marco conceptual para efectuar el análisis del desarrollo en la región, incluyendo la autonomía, así como las interconexiones de las esferas política, estatal, socioeconómica y cultural.

El presente volumen representa una segunda fase, en la cual las ideas planteadas en un primer momento son empleadas aquí como marco analítico y examinadas de manera crítica por científicos/as sociales de diversas generaciones y territorios, en estudios paralelos acerca de los últimos cincuenta años en cinco países de la región: Argentina, Brasil, Chile, México y Perú.

La contribución analítica y comparativa de este libro, los estudios que profundizan en cinco importantes países, su actualización en el contexto general y sus conclusiones que muestran el término de una época política en América Latina, así como los complejos inicios de otra, constituyen un aporte insustituible para inspirar a futuros investigadores e investigadoras y al público interesado en la comprensión de nuestra región.

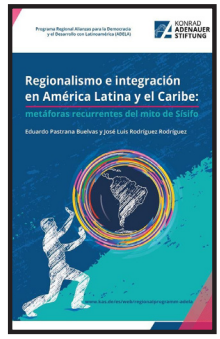
Política exterior colombiana: la agenda de Gustavo Petro

Eduardo Velosa, Eduardo Pastrana Buelvas, Diego Vera. Fundación Konrad Adenauer (KAS) y Coordinadora Regional de Investigaciones Económicas y Sociales (CRIES). 392 páginas.

El ascenso de Gustavo Petro Urrego, con su historia de vida y las ideas que profesa, a la presidencia de Colombia en agosto de 2022 ha supuesto una ruptura con la tradición política colombiana. Desde lo doméstico, el candidato Petro logró aunar a distintas fuerzas sociales y, con esto, pudo conformar una mayoría electoral que, en su tercer intento, pudo derrotar a los partidos y a la clase política tradicionales. Esta victoria tuvo efectos internacionales, toda vez que, desde lo internacional, Colombia se sumó a los movimientos políticos hacia la izquierda del espectro ideológico que han ocurrido en América Latina y el Caribe en los últimos años. Y lo hizo en un tiempo en el que el sistema internacional se enfrenta a diversas fuerzas y corrientes ideológicas que buscan sentar las bases de un orden internacional que reflejen los valores y las capacidades materiales de las principales potencias, al mismo tiempo que resalte los intereses y las identidades de aquellos actores considerados como secundarios. Esta renovación política colombiana, que junto al Ejecutivo también ocurrió en el Legislativo, ha tenido efectos en distintos niveles desde los mismos días de las elecciones. Incertidumbres crecientes en lo económico, en lo institucional, en lo social, en la seguridad, y en otros ámbitos, han ocupado los pensamientos de sectores de la sociedad y de la comunidad internacional. Para otros, por el contrario, alivios y esperanzas alimentan una visión más positiva del gobierno de Petro, que conducirá a un relacionamiento internacional distinto del país, más asertivo y menos sumiso a las disposiciones de los poderes tradicionales. Precisamente, la complejidad de la política exterior colombiana en los primeros meses del gobierno Petro es lo que este texto busca abordar. ¿Qué cambios en su política exterior, si los ha habido, ha introducido el gobierno Petro? ¿Cuáles han sido, en lo corrido del gobierno, las principales prioridades y, al tiempo, los grandes silencios en el actuar internacional de Colombia? ¿De qué manera las estructuras y coyunturas, internacionales y domésticas, facilitan o constriñen al gobierno Petro para adelantar su agenda internacional? Con el ánimo de alimentar el debate académico y público sobre la política exterior colombiana, los autores proponen algunas respuestas a estas preguntas

Regionalismo e integración en América Latina y el Caribe: metáforas recurrentes del mito de Sísifo

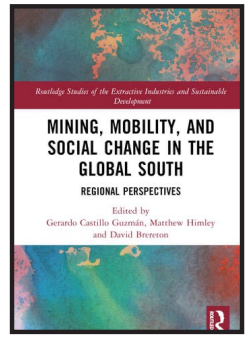
Eduardo Pastrana Buelvas y José Luis Rodríguez Rodríguez. Konrad Adenauer Stiftung. 235 páginas.



Esta obra busca comprender e interpretar, entre otros, tres factores que han desempeñado un rol negativo en el desarrollo y la sostenibilidad de los procesos de regionalización e integración regional en América Latina y el Caribe: el proceso inacabado de construcción del Estado, que incide en la renuncia a transferir soberanía a los proyectos de integración y regionalización; la presidencialización de la integración, como expresión de los fuertes presidencialismos que caracterizan los regímenes políticos de los Estados de la región; y la ideologización de los proyectos de integración. Además, la publicación incluye una reflexión final sobre lo que pueden representar para América Latina y el Caribe las experiencias de la Asociación de Naciones de Asia Sudoriental (ASEAN) y las organizaciones regionales y subregionales de África, de cara a los desafíos que enfrenta.

Mining, Mobility, and Social Change in the Global South: Regional Perspectives

Gerardo Castillo Guzmán, Matthew Himley, David Brereton. 250 pages.



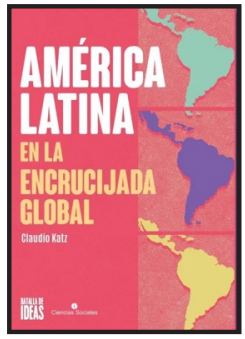
This volume focuses on how, why, under what conditions, and with what effects people move across space in relation to mining, asking how a focus on spatial mobility can aid scholars and policymakers in understanding the complex relation between mining and social change.

This collection centers the concept of mobility to address the diversity of mining-related population movements as well as the agency of people engaged in these movements. This volume opens by introducing both the historical context and conceptual tools for analyzing the mining-mobility nexus, followed by case study chapters focusing on three regions with significant histories of mineral extraction and where mining currently plays an important role in socio-economic life: the Andes, Central and West Africa, and Melanesia. Written by authors with expertise in diverse fields, including anthropology, development studies, geography, and history, case study chapters address areas of both large- and smallscale mining. They explore the historical-geographical factors shaping mining-related mobilities, the meanings people attach to these movements, and the relations between people's mobility practices and the flows of other things put in motion by mining, including capital, ideas, technologies, and toxic contamination. The result is an important volume that provides fresh insights into the social geographies and spatial politics of extraction.

This book will be of great interest to students and scholars of mining and the extractive industries, spatial politics and geography, mobility and migration, development, and the social and environmental dimensions of natural resources more generally.

América Latina en la encrucijada global

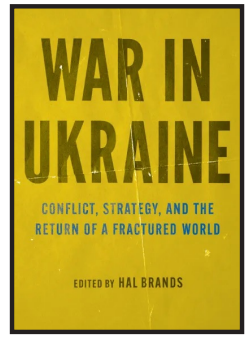
Claudio Katz. Batalla de Ideas. 366 páginas



El autor evalúa el lugar de la región en la disputa entre Estados Unidos y China, destacando las diferencias entre ambas potencias y los cursos de resistencia popular, replanteo geopolítico y renegociación económica en debate. El libro analiza el perfil de la derecha latinoamericana destacando sus cimientos neoliberales y estableciendo comparaciones con sus pares de Europa y Estados Unidos. Distingue la impronta actual del fascismo clásico y de las vertientes populistas, y remarca los avances y límites de esta oleada. Indaga también el nuevo ciclo de gobiernos progresistas, evaluando las expectativas e incumplimiento de promesas. El papel de las revueltas y sus efectos electorales se expone junto a hipótesis de futuro, centradas en la integración, la soberanía política y el protagonismo popular.

War in Ukraine: Conflict, Strategy, and the Return of a Fractured World

Hal Brands. Johns Hopkins University Press. 324 pages.

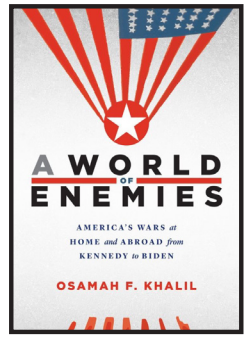


When Vladimir Putin's forces sought to conquer Ukraine in February 2022, they did more than threaten the survival of a vulnerable democracy. The invasion unleashed a crisis that has changed the course of world affairs. This conflict has reshaped alliances, deepened global cleavages, and caused economic disruptions that continue to reverberate around the globe. It has initiated the first great-power nuclear crisis in decades and raised fundamental questions about the sources of national power and military might in the modern age. The outcome of the conflict will profoundly influence the international balance of power, the relationship between democracies and autocracies, and the rules that govern global affairs.

In War in Ukraine, Hal Brands brings together an all-star cast of analysts to assess the conflict's origins, course, and implications and to offer their appraisals of one of the most geopolitically consequential crises of the early 21st century. Essays cover topics including the twists and turns of the war itself, the successes and failures of US strategy, the impact of sanctions, and the future of Russia and its partnership with China.

A World of Enemies: America's Wars at Home and Abroad from Kennedy to Biden

Osamah F. Khalil. Harvard University Press. 408 pages.



Over the past half-century, Americans have watched their country extend its military power to what seemed the very ends of the earth. America's might is felt on nearly every continent—and even on its own streets. Decades ago, the Wars on Drugs and Terror broke down the walls separating law enforcement from military operations. A World of Enemies tells the story of how an America plagued by fears of waning power and influence embraced foreign and domestic forever wars.

Osamah Khalil argues that the militarization of US domestic and foreign affairs was the product of America's failure in Vietnam. Unsettled by their inability to prevail in Southeast Asia, US leaders increasingly came to see a host of problems as immune to political solutions. Rather, crime, drugs, and terrorism were enemies spawned in "badlands"—whether the Middle East or stateside inner cities. Characterized as sites of endemic violence, badlands lay beyond the pale of civilization, their ostensibly racially and culturally alien inhabitants best handled by force.

Yet militarized policy has brought few victories. Its failures—in Iraq, Afghanistan, US cities, and increasingly rural and borderland America—have only served to reinforce fears of weakness. It is time, Khalil argues, for a new approach. Instead of managing never-ending conflicts, we need to reinvest in the tools of traditional politics and diplomacy.

China en América Latina y el Caribe: ¿Nuevas rutas para una vieja dependencia?: El nuevo 'tercer mundo' y la perspectiva del 'desarrollo'

Rubén Laufer y Fernando Romero Wimer.
Appris Editora. 537 páginas.

Es un libro que asume una posición crítica para considerar el gigante asiático como nueva gran potencia del siglo XXI. Algunos de los principales vectores de fuerza que impulsan esta obra son interrogantes apremiantes sobre la actualidad y el pasado reciente. Políticos, economistas, empresarios, diplomáticos, periodistas, así como movimientos sociales, organizaciones populares y partidos políticos en todo el mundo, reflexionan y debaten sobre las estrategias de crecimiento y expansión de Beijing y su contrapunto con la larga declinación relativa de Estados Unidos. También está sobre la mesa el carácter de sus relaciones con el resto del mundo. ¿Qué es China? ¿Se trata de un país 'en desarrollo' perteneciente al 'Sur global', o es una superpotencia en ciernes que reclama hegemonía y disputa mercados y áreas de influencia con el imperialismo estadounidense y demás grandes poderes internacionales? ¿Beijing es portador de un mensaje de transformación o de conservación de las 'reglas' internacionales? ¿Qué significa la China emergente para los países del mundo llamado 'en desarrollo', y para los de América Latina y el Caribe en particular? El desafío a la superpotencia norteamericana constituye hoy la principal fuente de tensiones en un escenario internacional de transición hegemónica, cuestionamientos al liderazgo estadounidense, renovada competencia comercial, tecnológica y de seguridad, y nuevas relaciones asimétricas de China con los países 'en desarrollo'. ¿Nace un nuevo 'tercer mundo'? ¿Se reactivan las viejas relaciones de asociación subordinada y atraso industrial, reorientadas ahora hacia la nueva potencia ascendente? ¿Siguen vigentes, respecto de China, las tradicionales categorías de análisis de imperialismo y dependencia? ¿Qué sentido adquieren, en consecuencia, conceptos como relaciones estratégicas, complementariedad, cooperación para el desarrollo, beneficio mutuo, y multilateralismo? ¿Qué perspectivas abren los bloques liderados por China como los BRICS+ y la Organización de Cooperación de Shanghái? En América Latina y el Caribe, la irrupción de China como gran socio económico confiere a estas cuestiones una actualidad acuciante. Este libro reivindica la trascendencia que para millones de ciudadanos de esta región tiene el conocimiento de las determinaciones y condicionantes del mundo contemporáneo

Las actividades militares en el derecho del mar contemporáneo y su clasificación en la zona económica exclusiva

Leopoldo M. A. Godio. El Derecho. 410 páginas.

El trabajo plantea una hipótesis como guía de la investigación: "[…] la intención de realizar un aporte original y […] el deseo de contribuir a una aproximación objetiva y justificada del concepto 'actividades militares' dentro de los usos de la Convención de las Naciones Unidas sobre el Derecho del Mar de 1982". Para ello, estudia las actividades militares en la zona económica exclusiva (ZEE), incluyendo el examen de distintas situaciones, como la navegación de los buques de guerra extranjeros, los ensayos y maniobras militares o la investigación científica con estos mismos fines, entre otras, además de realizar una evaluación respecto de otras zonas u acciones que permitan esclarecer el concepto y los límites del derecho internacional aplicable a aquellas.

La obra aborda y desarrolla tres cuestiones: a) el derecho –o no– de un Estado para realizar actividades militares en las ZEE de otros Estados y las posibles acciones frente a ellas, en consecuencia, del ribereño; b) la determinación del derecho aplicable a estas operaciones; y c) los procedimientos para resolver aquellas controversias que surjan en consecuencia y en caso de prosperar la excepción facultativa referida a las actividades militares.

Democracia, economía, migraciones y salud en la integración del siglo XXI

María Victoria Álvarez y Virginia Saldaña Ortega. Colección Gridale. 249 páginas.

Nos encontramos ante el segundo de tres tomos de la colección Gridale que recoge temas de varias de las ponencias presentadas por académicos latinoamericanos y europeos en un simposio organizado por el Gridale y el IELEPI en la Universidad Alcalá de Henares, España, en octubre del 2022, para analizar los resultados de la Conferencia sobre el Futuro de Europa, realizada entre el 2021 y el 2022, con el objetivo de brindar oportunidades a la ciudadanía europea de sugerir temas para la profundización de su proceso de integración. El tomo XIV de la colección Gridale abarca, de esta manera, investigaciones impulsadas por la reflexión en torno a los resultados de la Conferencia sobre el Futuro de Europa, pero, particularmente, por la proyección de esta reflexión hacia las experiencias regionalistas en América Latina y el Caribe. En la totalidad de los capítulos, los autores hacen referencia tanto a la integración latinoamericana como a la europea, aunque esas referencias varían en cantidad y profundidad. El libro condensa, en particular, ponencias sobre políticas económicas, políticas sociales, salud y migraciones, y, asimismo, sobre participación ciudadana y gobernanza multinivel. Temas todos de enorme relevancia, pertinencia y actualidad para los ciudadanos europeos y latinoamericanos.

Los desafíos globales de la Unión Europea: Transformación digital, participación ciudadana y relaciones con América Latina

Bruno Theodoro Luciano y Catherine Ortiz Morales. Colección Gridale. 215 páginas.

Este libro tiene como objetivo reflexionar sobre los principales resultados de la Conferencia sobre el Futuro de Europa, organizada en 2022 en el contexto del proceso de integración de la Unión Europea, y discutir en qué medida esta experiencia europea ofrece lecciones relevantes para la superación de los actuales desafíos del regionalismo latinoamericano. El libro es parte de los resultados académicos de la Conferencia Euro-Latam organizadas por GRIDALE y el IELEPI, en octubre de 2022, en Madrid (España). Tiene como objetivo contribuir con la discusión académica acerca de algunos de los temas fundamentales tratados en el contexto de esta Conferencia Europea, como la transformación digital, la participación democrática, y el rol de Europa en el mundo, especialmente, acerca de sus relaciones con América Latina.

Re-trabalhando as classes no diálogo Norte-Sul: trabalho e desigualdade no capitalismo pós-covid

Elísio Estanque, Agnaldo de Sousa Barbosa e Fabrício Maciel. Editora Unesp. 424 páginas.

O livro divide-se em três eixos principais, todos interligados e alinhados com os objetivos de internacionalização das ciências sociais, promovendo a interdisciplinaridade. São eles: uma discussão ampla e reflexiva sobre as sociedades contemporâneas, enfatizando a complexidade e os ritmos de mudança no contexto do capitalismo global, enquanto mantemos um diálogo Norte-Sul, explorando suas interconexões e possíveis formas de cooperação, especialmente após a pandemia; em segundo lugar; uma análise focada nas relações de trabalho e nos processos de desregulamentação, fragmentação e precarização nos sistemas de emprego; e, por fim, uma linha de investigação voltada para os recentes processos de reestruturação das classes sociais, tanto como estruturas sociais objetivas quanto como atores sociopolíticos, em estreita relação com os movimentos e contramovimentos (identitários, populistas, feministas, antirracistas, anti-homofóbicos, etc.) dentro do contexto do recente ciclo de neoliberalismo, da pandemia e das implicações socioeconômicas da atual guerra na Europa.

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NORMATIVAS

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