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**HEGEMONY AND COUNTER-HEGEMONY IN
LATIN AMERICA
ALBA IN THE NEOLIBERAL WORLD ORDER**

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Socialism cannot be of calque or copy. It must be a heroic creation!

Hugo Chávez Frías (2008)

Resumo

A América Latina foi profundamente afetada pela crise financeira durante a década de 1980, caracterizada por alguns observadores, como David Harvey (2005) e Eric Hobsbawm (2016) como um momento revolucionário na história da economia mundial. Esta década é, por um lado, marcada pelo progresso do mundo globalizado e, por outro lado, pela ascensão dos Estados Unidos no exercício de um momento hegemónico. Através de um quadro teórico crítico, neo-Gramsciano, a presente dissertação pretende estudar este momento hegemónico e a reação de alguns países da América Latina através de um estudo de caso focado na Aliança Bolivariana para os Povos da Nossa América (ALBA).

A ALBA é aqui analisada como a expressão de um potencial movimento contra-hegemónico transnacionalizado que teve origem na Revolução Bolivariana Venezuelana. A Revolução Bolivariana inaugurou uma Constituição Nacional participatória que concedeu um papel central à sociedade civil e aos movimentos sociais na vida política Venezuelana, com o propósito expresso de emancipar pessoas “invisíveis” e não representadas, como comunidades indígenas e famílias a viverem em *barrios*. A ALBA pode ser entendida como a expressão deste movimento contra-hegemónico transnacionalizado que pretende unir a luta dos povos e afirmar que existem métodos alternativos de exercício de poder para além da democracia representativa e, por outro lado, métodos de desenvolvimento para além de modelos neoliberais. Contudo, esta dissertação também argumenta que o bloco histórico contra-hegemónico representado pela ALBA expressa contradições e tensões internas, que colocam em causa o seu projeto. Assim, uma cisão crescente é possível notar entre, por um lado os movimentos sociais que procuram exercer os seus direitos de mobilização e proteção garantidas pelas recentes Constituições e pela própria ALBA e, por outro lado, os governos nacionais centrais, cujos interesses em promover desenvolvimento económico e projetos de infraestruturas frequentemente chocam com os movimentos sociais, nomeadamente no que diz respeito aos custos sociais e ambientais destes projetos. Isto abre a hipótese de que, embora o bloco histórico contra-hegemónico tenha sido fundado na Venezuela e tenha ganhado expressão transnacional através da ALBA, as contradições e tensões entre os movimentos sociais e os países membros da ALBA poderão estar a causar a fragmentação do bloco histórico e, conseqüentemente, a provocar o enfraquecimento do movimento contra-hegemónico.

Key words: (ALBA; movimentos sociais; hegemonia; contra-hegemonia, neo-Gramsciano)

Abstract

Latin America was deeply affected by the debt crisis in the 1980s, a decade characterised by some observers, such as David Harvey (2005) and Eric Hobsbawm (1994), as a revolutionary turning point in the world's economic history. This decade was also marked by the progress of the globalised world and the rise of the United States hegemonic moment. Within a critical, neo-Gramscian theoretical framework, the present dissertation engages in studying this hegemonic moment and some Latin American countries' reaction to it, focusing on a case study, the Bolivarian Alliance for the Peoples of Our America (ALBA).

ALBA is analysed as an expression of the transnationalised counter-hegemonic historical bloc of social forces which originated through Venezuela's Bolivarian Revolution. The Bolivarian Revolution inaugurated a protagonistic National Constitution, which gave a central role to civil society and social movements in political life, with the expressed purpose to emancipate the "invisible", unrepresented people like indigenous communities and families living in *barrios*. ALBA can be understood as a transnationalised expression of this movement, uniting people's struggles to affirm there are alternative methods to exercise power other than representative democracy on the one hand and to development other than through neoliberal models on the other. Nevertheless, the present dissertation also argues that the counter-hegemonic historical bloc represented by ALBA expresses internal tensions and contradictions which may compromise the project's cohesion. The growing tensions and contradictions are especially evident when analysing social movements struggles about the environmental impacts caused by massive infrastructure projects favouring the development of the economy and big corporations. While social movements try to exercise their rights to mobilisation and protection guaranteed by their newly approved protagonistic Constitutions and by ALBA itself, national and transnational corporations, including central governments, may try to subvert social movements voices and engage in infrastructure projects despite its environmental and social cost.

This opens the hypothesis that although a counter-hegemonic historic bloc was founded in Venezuela and gained transnational expression through ALBA, the contradictions between the social movements and ALBA member countries may be causing the historical bloc to fracture and, consequently, the counter-hegemonic movement to weaken.

Keywords: (ALBA; social movements; hegemony; counter-hegemony; neo-Gramscian)

Lists of acronyms

AC	<i>Articulación Continental</i> (Continental Articulation)
ALBA	Bolivarian Alliance for the Peoples of our America (<i>Alianza Bolivariana por los Pueblos de Nuestra America</i>)
ALCA	<i>Área de Libre Comercio de las Américas</i> (Free Trade Area of the Americas)
CACM	American Common Market
CDA	Critical Discourse Analysis
CMS	<i>Consejo de los Movimientos Sociales</i> (Social Movements Council)
CTV	Venezuelan Worker's Federation
ECLA	United Nations Commission for Latin America
ECSC	European Coal and Steel Community
FEDECAMERAS	<i>Federación de Cámaras y Asociaciones de Comercio y Producción de Venezuela</i>
IMF	International Monetary Fund
IIRSA	South America Regional Infrastructure Integration Initiative
IR	International Relations
ISI	Import Substitution Industrialisation
LAFTA	Latin America Free Trade Association
LAIA	Latin American Integration Association
MAS	<i>Movimiento al Socialismo</i> (Movement for Socialism)
Mercosur	Common Market of the South
MVR	<i>Movimiento Quinta República</i> (Fifth Republic Movement)
NAFTA	North American Free Trade Agreement
NRA	New Regionalism Approach
PDN	<i>Plan de Desarrollo de la Nación</i>
PDVSA	<i>Petróleos de Venezuela</i>
SELA	Latin American Economic System
WTO	World Trade Organization

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INTRODUCTION

In the late 1970s through to the 1980s, the world reached a crucial turning point, characterised by the acceleration of the configuration of a new political and economic system which came to be recognised as neoliberal globalisation. From the 1970s onwards, political and economic policies were implemented throughout the world, such as deregulation and privatisation, envisioning the withdrawal of the state from sectors of social provision. This process became hegemonic as a mode of discourse, occupying prominent influence in education, media, corporate boardrooms, and key institutions like the International Monetary Fund (IMF) and the World Bank.

This process brought great challenges to Latin America, which, overwhelmed by a tremendous economic crisis, was the target of the IMF's structural adjustment policies. These policies would soon lead to numerous social upheavals in Latin America, such as the *Caracazo* episode in Venezuela, but also to the election of the various political left or centre-left leaders such as Hugo Chávez in Venezuela, Evo Morales in Bolivia, or Lula da Silva in Brazil who started to search for alternative development approaches. From amidst the Latin American 'Pink Tide', which names the present phenomenon, Hugo Chávez became the intellectual author of the Bolivarian Revolution, which inaugurated a new participatory National Constitution focused on social movements and the emancipation of the people through their struggles and mobilisation.

In 2005, the Summit of the Americas gathered in Mar del Plata to celebrate a new economic free trade agreement, the *Área de Libre Comercio de las Américas* (ALCA) or, in English, the Free Trade Area of the Americas (FTAA). This agreement would serve as an expansion to the previously celebrated North American Free Trade Agreement (NAFTA), which aimed to unite a free trade area "from Alaska to Patagonia" (FTAA, 2003). However, in this same event, a parallel Summit took place to show resistance and discontent with the ALCA. As a result, Hugo Chávez, Néstor Kirchner, and Lula da Silva, the political leaders of Venezuela, Argentina, and Brazil respectively, formed a diplomatic alliance to stop the approval of the ALCA. In this historical moment, Chávez presented to Latin America, in the Summit of the Peoples, the Bolivarian Alliance for the Peoples of Our America or *Alianza Bolivariana para Los Pueblos de Nuestra America* (ALBA).

The struggle for a political, economic, and social alternative resulted in ALBA, a regional institution founded by Venezuela and Cuba in 2004, which reclaims socialism and reinvents it into the “socialism of the 21st century”. As a result, ALBA became an institution that came to be characterised by authors such as Thomas Muhr and Ken Cole as “counter-hegemonic”. Thus, the present study aims to investigate whether this counter-hegemonic initiative lived up to its title and truly represented or still represents a counter-hegemonic international institution. The main question informing this study is the following:

To what extent did ALBA constitute a counter-hegemonic regional project in a global neoliberal hegemony context?

The present study follows a neo-Gramscian theoretical framework. Antonio Gramsci became a crucial Marxist author with his main intellectual work, the *Prison Notebooks*, where he describes the dialectical unity between materialist and discursive approaches to express his conception of history and the philosophy of praxis. Gramsci reaches the concept of hegemony through this dialectic unity, representing a specific conception of power as exercised via coercion and consent. From the conception of hegemony, Gramsci explored strategies for conquering power through counter-hegemonic movements, thus describing strategies to replace hegemonic consensus. The contesting of consensus with other conceptions of the world is, according to Gramsci, how humanity progresses and how history truly flows through the replacement and refreshment of ideas.

Neo-Gramscian approaches, like Robert Cox’s, emerged in the process of applying Gramsci’s concepts to the study of International Relations (IR). Cox differentiated himself from the mainstream conceptions of hegemony and focused on the close relation between production and social relations. Cox’s main goal of mapping social relations was to study the potentials for structural change at the national, inter-state and global levels. Thus, Cox’s conception of world order is characterised by a hegemonic mode of production sustained via the coercion apparatus of some countries and the consent guaranteed by the unquestioned legitimacy of supposedly universal norms, protocols and institutions. Other important neo-Gramscian approaches, such as Stephen Gill and William Robinson’s focus on processes of transnationalisation of class and counter-hegemonic movements, even if expressing important differences amongst them, which are explored in this study through the analysis of ALBA.

ALBA is the expression of the transnationalisation of the national-based counter-hegemonic historical bloc of social forces. As mentioned above, Hugo Chávez, the intellectual author of the Bolivarian Revolution, approved a National Constitution within the frameworks of a participatory democratic model in his first year as President of Venezuela. This indicates the crucial importance of social movements in the life of the Bolivarian state, which was given transnational expression in the creation of the Council of Social Movements (CMS).

The CMS may have gone through what Martínez named of a counter-hegemonic double-turn in which social movements deviate their action from state-centric integration projects. Although Martínez argues that the counter-hegemonic double turn emerges from the creation of the Continental Articulation or *Articulación Continental* (AC), the present study argues that this process was due to a growing tension between social movements and governmental elites from the counter-hegemonic movements. Thus, ALBA's counter-hegemonic movement became limited due to contradictions, namely regarding development paradigms, which may risk the counter-hegemonic movements' future.

The unity between materialist and discursive forms of explanation and analysis of power relations makes the Gramscian approaches compatible with Critical Discourse Analysis (CDA) methodologies. According to CDA, meaning and understandings are formed by people ultimately discursively reflecting each person's material and social conditions. Accordingly, this linguistic approach focuses on dominant discourses, how they are formed, consented to, and legitimised. In this study, CDA is used to understand the narratives of hegemonic and counter-hegemonic discourses framing the formation and development of ALBA to assess to what extent it constitutes a counter-hegemonic regional project in a global neoliberal hegemony context.

In order to understand ALBA, it is necessary to frame it in the development of regionalism in Latin America. The idea of a regional Pan-Latin Americanism integration project is not a new idea in the Latin American regionalism framework. Regarding integration projects, Latin America has been through four phases or waves of integration processes which are contextualised in a certain historical framework. Thus, informing this study, investigating the integration processes in Latin America is important to describe what characterises the fourth wave of Latin American integration, of which ALBA is a part.

This dissertation is divided into five chapters. The first chapter is dedicated to the literature review regarding regionalism theories, and it aims to provide a general view of regionalism,

exploring the “old” and “new” approaches to regionalism. The chapter then focuses on regionalism in the Latin American framework, explaining the various phases of regionalism and each waves’ historical context.

Chapter two is dedicated to discussing the theoretical frameworks framing this study, addressing the main concepts and mechanisms of forming historical blocs and the construction of world hegemony/counter-hegemony. Thus, the chapter discusses the origins of Gramscian thought with the work of Antonio Gramsci. Then, the chapter considers neo-Gramscian approaches, focusing on how Robert Cox applies Gramscian concepts to the study of world politics. The chapter concludes with the debate between Stephen Gill and William I. Robinson concerning processes of transnationalisation of class and hegemonic/counter-hegemonic movements.

The third chapter provides a closer analysis of ALBA and its potential role as the institutional expression of the transnationalisation of a counter-hegemonic movement in Latin America. In this context, the work of Thomas Muhr is considered, as well as Jennifer Martínez’s notion of “counter-hegemonic double-turn.” This chapter also considers the CDA methodology informing this study.

Chapter four discusses the Bolivarian Revolution in Venezuela as the formation of the national base of a counter-hegemonic historical bloc aimed at transforming the social configurations of the Venezuelan state. First, the chapter considers how Hugo Frias Chávez used historical figures like Simón Bolívar and transported them into the 21st century as part of a self-described process of socialist reinvention that concedes a historical role to social movements and the “invisible,” unrepresented people. The chapter then explores Bolivarian Venezuela’s foreign policy envisioning a “new strategic map,” in the context of which it formed an important alliance with Cuba, with the two countries ultimately co-founding ALBA on the principles of “21st century socialism”. From this perspective, ALBA is analysed as an institutional vessel for the transnationalisation of the Venezuelan historical bloc of social forces and the counter-hegemonic movement these represent. Finally, this chapter concludes with the first diplomatic victory of the Venezuelan counter-hegemonic bloc against neoliberalism in the Mar del Plata Summit of the Americas in 2005.

The fifth and final chapter considers the Bolivarian Revolution’s dilemmas, namely the tensions and contradictions which ultimately might have waned the enthusiasm with Chávez’s Bolivarian project. First, the chapter analyses the contradictions within the

Bolivarian Venezuelan context by focusing on the tensions arising between the revolutionary elite in control of the national state and the social movements that sought to mobilise aimed at ultimately building a communal state. The chapter then explores these contradictions at the international level. It explores the contradictions ALBA's social movements faced in the transnationalisation process of the counter-hegemonic movement and if these tensions weakened the overall movement.

The chapter discusses these tensions and contradictions in four dimensions (social movements, the state, ALBA, and the global sphere) of one common struggle, environmental protection. The chapter concludes by discussing the problem of national-based counter-hegemonic movements that fail to transnationalise, emphasising the difficulties that this transnationalisation implies and how these lead to a reflection on the potential future paths of development counter-hegemonic movements in Latin America. In the context of this discussion, this study relies on a direct testimonial of Hernan Vargas (2021), who has had an important role in the coordination of ALBA's CMS. ALBA expresses an attempt to transnationalise a counter-hegemonic movement that heavily relied on social movements. Despite its contradictions, failures, and wrong turns, ALBA represents a historical challenge to confront neoliberalism, resist, and build an alternative. For this goal, there is still much to be done, and this study is a small contribution to think through these processes and their implications.

Chapter 1: Literature Review

1.1. Introduction

To study ALBA, it is crucial to first approach this counter-hegemonic regional institution by introducing its framework and considering the literature on regionalisation processes. To this end, this first section considers a general framework about regionalisation approaches, while the second one is focused on the Latin American regional framework.

The following two sections contain the state of art on regionalism theory. The first section aims to provide a general map of regionalism and regionalisation studies. It discusses how regionalisation emerged from the post-World War II context and how regionalism studies conceived the final purpose of regionalisation processes. Finally, it addresses the two most important phases in regionalism processes identified in these studies as “old” and “new” regionalism approaches and how the “New Regionalism Approach” (NRA) emphasises the importance of the insertion of the globalisation process into regionalisation studies.

The second section focuses on regionalism studies concerning Latin American regional projects, centring on the various phases of regionalisation in the region and exploring the various concepts associated with each one. This analysis starts in the 1950s, from the implementation of Import Substitution Industrialisation (ISI) on Latin America to *Caracazo* and Chávez’s declaration of the 21st Century Socialism, as well as the emergence of the New Left and the Pink Tide movements in the region. Next, this analysis follows the periodisation developed by Dabène (2012, 2018), as well as Drake (2006), which differentiates between four waves of regionalisation since the end of World War II. This will permit us to locate the development of ALBA, discussed in the next chapter, in the wider development of the region.

1.2. Regionalism Approaches

According to Wunderlich (2007:1-4), regionalism theory is divided into two main waves, each characterised by its theoretical debates. The first wave’s historical context is the end of World War II and the development of the European Community, as well the urgent security dilemma characterising the Cold War. During the first wave, regionalism theory is centred on the debate between the supranational and the intergovernmental models, the first defending a regionalisation model in which sovereignty is restrained through the establishment of supranational institutions and, the latter arguing for a system where sovereignty is emphasised within regional institutional frameworks.

The second wave of regionalism theory arises in the context of a growing awareness of the negative impacts of globalisation. According to Hettne (1999:6), there are counter-processes to globalisation, and regionalisation is one of them.

It is important to underline the clear difference between regionalism and regionalisation in what concerns concept definition. The first implies an agenda, a strategy that may lead to formal institution-building. The latter corresponds to the processes that lead to patterns of cooperation, integration, and the convergence of interests within a particular geographical zone (Wunderlich, 2007:1-7). Both “old” and “new” regionalism approaches define the concept of “region” in different ways. While the “old regionalism” approach refers to a limited number of states linked together by a geographical relationship and a degree of mutual interdependence (Hettne & Soderbaum, 2000:462), the “new regionalism” approach understands regionalisation processes in terms of “regionness”. To transcend state-centric and even regional organisations and institutional approaches, “regionness” understands that all regions are socially constructed and hence politically contested (Hettne, 2006:544). Thus, this concept understands that a region must undergo an endogenous process emerging within a geographical area.

The present chapter aims to analyse the state of the art on regionalism. Thus, the rest of this section is dedicated to a general study of regionalisation theories, analysing the main differences between the “old” and the “new” regionalism approaches. The second section is focused on the regionalisation processes localised in Latin America. Contrary to the European Community’s single regionalisation experience, Latin America is marked by multiple regionalisation processes with diverse political narratives and models of integration. Thus, the last section of the present chapter aims to demonstrate the four waves of Latin American regional integration in order to locate ALBA within the latest, the post-neoliberal phase.

1.2.1. Old Regionalism Approaches

As mentioned above, the old regionalism approach is particularly marked by the development of theoretical approaches that search for answers and explanations for the regional integration of Western Europe and the security dilemma arising in the anarchical condition of the international system. In the post-World War II period, when inter-war Wilsonian liberalism had failed alongside the League of Nations in the 1930s-decade, IR’s realism became the dominant paradigm in the still-young academic field (Wunderlich, 2007:8). To clarify, realism is a paradigm that asserts that politics are rooted in a permanent and unchanging human self-interested nature, which is reflected in the anarchic international system where states are the central agents seeking to satisfy their conflicting interests (Sorensen, 2013:72-75). With the

advent of the Cold War, the concern with security became central. The danger that the security dilemma's paradox posed was considered the main threat to states who only had themselves to secure self-defence in a self-help framework.

In this context, regionalisation processes are understood to have emerged with the objective to wain the centrality of the state's agency, framing it within supranational structures to deviate and multiply agency in the international system's framework. Within regionalisation studies, it is possible to identify three possible approaches to the phenomenon of supranational regional integration: The federalist approach, functionalism and, neo-functionalism.

Considering the European Communities' example, Churchill's speech in Zurich (1946) sparked enthusiasm over a federalisation process to concretise the "United States of Europe." In the post-World War II context, nationalism was perceived to be the source of intra-European contests, and supranational approaches within regionalisation theory started to gain advocates. Federal approaches, which have a clear supranational dimension, propose the creation of a political community founded on a strong constitutional and institutional framework (Wunderlich, 2007:8-10). These approaches support the thesis that a central supranational government endowed with sovereign authority would ultimately suppress the power of the nation-states and limit their authority in designated areas. According to this approach to regionalism, once nationalism was suppressed, warfare between individual states would cease.

David Mitrany (1994:77-98) challenged the dominant realist paradigm and saw value in an intergovernmental alternative to avoid international warfare. Mitrany's liberal ideals were, similarly to Woodrow Wilson, of achieving "peace through law". While the League of Nations was short-lived and liberal internationalism as a theoretical approach discredited, functionalism emerged as the means to achieve perpetual peace (Wunderlich, 2007:11). According to Mitrany (1994:79), a regional project must envision a path in which it is possible to subdue the political division that lies at the root of conflict between competing political units. Otherwise, regionalism would be counter-productive because, while federalism contains and mitigates sovereignty, ultimately, the conflicting interests of political units would be reproduced at a higher level in the form of the conflicting interests of federal states behaving as sovereign entities (Wunderlich, 2007:11). Thus, according to Mitrany's functionalist approach, successful regionalisation processes depend on their capacity to integrate nation-states without conflicts and in ways that diminish political divisions. To this end, regionalisation should become a much wider and continuous adaptation process, based on the development and cooperation of various networks to attain social development, and gradually transcend political

divisions deriving from previously existing international relations between sovereign states (Wunderlich, 2007). Mitrany's functionalism seeks to develop a pragmatic approach in line with the historical transitional period from which this approach emerged from.

The neo-functionalism approach is associated with the opening of the second great debate in International Relations between Behaviourism, favouring empirical analysis, and Traditionalism, which emphasises the importance of history and philosophy (Wunderlich, 2007:12-13). Erns B. Haas (1964, 2003) is considered one of the main proponents of the Behaviourist approach and attempted to provide a perspective on how the world system could be perceived as being organised into functionalised agencies that reinforced the possibility of building cooperation based on competing and colluding sub-national, national, and non-state interests (Schmitter, 2007). Neo-functionalism argues that three main mechanisms condition the development of regionalism processes: Task expansion, spillover, and *engrenage*. Task expansion refers to the increase of interstate cooperation within various areas. Task expansion occurs when a successful negotiation and cooperation process leads to the further negotiation of other initiatives, facilitating the procedures towards deeper integration (Groom, 1994:112-121). Spillover is the most relevant concept and refers to a situation in which integrating one economy sector will lead to a path dependence¹ lock-in situation and further integration of other economic sectors and political activities (Groom, 1994:112-121). Spillover could result from task expansion as further cooperation leads it to spill over into adjacent domains. One example of this is the steel and coal compromise in the European Coal and Steel Community (ECSC), which led to an opportunity for further economic integration. Reaching compromises in technical areas, such as coal and steel, could lead to the integration of other economic and technical areas as the benefits from the initial negotiation became visible. Theoretically, in the long run, this dynamic negotiation process could lead to political integration. This constant flow of negotiation and integration processes engages the integration process into a situation of *engrenage*, the result of the spillover mechanisms that indicated a lock-in process situation (Borg, 2015:48).

Neo-functionalism started to lose importance as an approach to the study of regionalism in the 1970s and early 1980s, as empirical developments started to apparently contradict the theory. Moreover, during this period, there was a considerable slowdown of spillover situations that

¹ Path dependence is a situation in which the outcome of a process depends on its history, on a sequence of decisions made by agents and resulting outcomes. A path dependence lock-in situation is when the system is trapped from which an agent can't escape without the involvement of an outside force by historical events (Path Dependent, 2021).

were not foreseen nor explainable by the theory, which limited European integration to “low politics” while high politics were still very much attached to the authority of sovereign states (Wunderlich, 2007:29-30). As a result, several criticisms of the approach arose that contested its capacity to explain developments in the European integration process. Furthermore, neo-functionalism was also criticised for its Eurocentrism and lack of account of regionalisation processes in other regions of the globe (Wunderlich, 2007:29-30).

Even so, neo-functionalism theory was a start. It came to represent an effort to construct a general theory of regionalisation processes, even if it was eventually superseded by events. Considering the criticisms of neo-functionalism, a new approach emerged to answer and overcome the problems of what became known as the “old regionalism” concerning the dimensions of analysis, the role of agency and, most importantly, the horizons on regional integration studies, emphasising the analytical importance of other regionalisation processes that emerged in other regions of the world.

1.2.2. New Regionalism Approach

The “New regionalism Approach” (NRA) refers to a phenomenon that emerged during the mid-1980s from the need to study world transformations associated with the acceleration of globalisation, accompanied by a significant decline of the North American hegemonic consensus and eventually the transition from the bipolar Cold War structure towards a new division of power (Söderbaum & Hettne, 1998:1-4).

According to Hettne and Söderbaum (1998: 2), the NRA comes to understand regionalisation processes as “a comprehensive, multifaceted and multidimensional process, implying a change of a particular region from relative heterogeneity to increased homogeneity with regard to a number of dimensions, the most important being culture, security, economic policies and political regimes.”

As mentioned above, the period between the 1970s and the early 1980s saw the slowdown of the European integration process as states were sceptic about the integration of high politics, namely topics concerning security and economic integration, amongst others. Consequently, neo-functionalism was discredited as a theory, and alternative approaches emerged to explain this slowdown of European integration while also seeking to understand regionalisation processes in other regions of the world in a wider, multifaceted framework. Thus, this new regionalisation approach became interested in the development of structural changes associated with the globalisation process and its impacts (Hettne, 1999).

Globalisation impacts the world's various regions differently, and NRA's regionalisation processes come to be understood as a response to these impacts. Thus, while old regionalisation focused predominantly on relations between nation states as the main driver of regionalism processes, NRA emphasises the role of global structural transformations, as well as of a multitude of actors, such as public and private actors, in regionalisation processes (Wunderlich, 2007:29-30).

NRA also establishes a distinction between formal and informal integration. The latter became very important as the NRA favoured a more careful definition of what composes a region, usually driven by social, economic, and political dynamics. Formal integration refers to the creation of transnational, organised spaces. Informal integration varies according to the level of “regionness”, the concept used to aggregate or disaggregate regions in the making. Hettne and Söderbaum (2000), define regionness as the “process whereby a geographical area is transformed from a passive object to an active subject capable of articulating, [homogenising] the transnational interests of the emerging region” (Hettne & Söderbaum:461). They add that this process can be intentional or otherwise, and it is usually an uneven process that includes economics, politics, culture, security, etc.

According to Hettne (1999:6-9), regionalisation could express a counter-process of globalisation, an answer to the negative impacts of this global process resulting from regional awareness. This process of “de-globalisation” would be the result of a process of bringing globalisation processes under some political-territorial control, a process similar to a “second movement” theorised by Polanyi (1957).

As proponents of NRA, Hettne and Söderbaum (2000) sought to include dimensions concerning economic, security and ecological issues from within a conceptualisation of a more careful definition of what a “region” is and what it is composed of. This was fulfilled in the concept of “regionness”, which can rise and decrease within social relations along several dimensions in a process to establish a *regional society* (Hettne & Soderbaum, 2000). This regional society, created through an integration process, bonded by a sense of “regionness”, needs to be protected from the impacts which result from global threats. Thus, according to the NRA approach, regionalisation processes aim essentially to interlink national interests from various dimensions with the objective of protecting civil society from globalisation. This does not mean these authors considered globalisation normatively evil and regionalisation good, but they tried to explain that globalisation can impact regions negatively, and regionalisation

processes seek to tackle these impacts through the regional homogenisation of national interests.

This argument was inspired by Karl Polanyi's work *The Great Transformation* (1957) which in essence defends that the most important costs (salaries, interest rates, raw materials) must be settled away from the markets and through a political process (Rodrigues, 2018) to defend civil society. Hettne (2002:6-25) argues that, in a potential future post-Westphalian world order, this protective approach will take place in a transnational regional space in defence of regional civil societies.

NRA thus conceives of the regional space as having the objective of defending regional civil societies from globalisation impacts and, in this sense, the NRA itself represents a "return of the political" by conceiving of regional integration processes as being influenced by states' willingness to integrate according to certain levels of *regionness*, in order to intervene in favour of crucial values, such as the development of security and peace or ecological sustainability as a way to wain the negative impacts of globalisation from within a functional organisation (Hettne, 1999:22).

Finally, NRA opens the possibility for the historical emergence of a new type of multilateralism. Multilateralism has got two different meanings, the first being an inter-state system, limited to relations among states through diplomatic channels. The second refers to relations among economic actors of civil society within a framework regulated by states and international organisations (Cox, 1992:162). In this case, Hettne (1999:21-23) affirms the possibility of a post-Westphalia order where the locus of power moves to the transnational level. The state would be further replaced or complemented by a regionalised order of political blocs, strengthened by a global civil society with a new normative architecture of world order values.

In conclusion, although the artificial separation between the old and new regionalism can be unproductive, there are some important contrasts that are theoretically significant. First, new regionalism aimed to consider a multitude of actors in regionalisation processes and emphasised the role of notions of "regionness". And second, the NRA added one essential component to the analysis of regionalism, the advent of globalisation and its impact on regional integration as a process of merger of national economies through cooperation between states (Hettne, 2002:6-25). This opened the possibility of a new form of multilateralism in the global order.

1.3. Latin American Regionalism

ALBA is but a moment in the history of Latin America's regionalism. Unlike Europe, whose regionalisation process was focused on one evolving institution, Latin America has been characterised by multiple regional projects throughout the decades (Dabène, 2012). Thus, Latin America presents us with different narratives and models of integration described by authors like Dabène (2012, 2018), who mapped four different moments of regional integration in Latin America, Briceño-Ruiz (2018) with his analysis of post-neoliberal regionalism, also known as the fourth wave of regionalisation, and Appelbaum and Robinson (2005), who provided a critical perspective on the role of globalisation in Latin American regionalism.

Latin America's regionalisation processes, according to Dabène (2018:51-63), may be divided into four different and interweaving regional "waves". By "regional wave", Dabène means the convergence of interests and policy preferences within a given historical context. The transition from one wave to the next is triggered by a paradigm shift.

The first wave is the "structuralist period" (1951/1969); the second the "revisionist period" (1973/1986); the third constitutes the "open regionalism period" (1991/2001) and, finally, the fourth one, the "post-neoliberal period" (2004/~), of which ALBA can be considered a key example.

The first "wave of regionalisation", also called the "structuralist period" (Rosenthal, 1991), corresponds to the period from the 1950s until the debt crisis starting in the 1980s when most Latin American countries had adopted ISI following the United Nations Commission for Latin America's (ECLA) recommendations to use regional economic integration as the means to accelerate industrialisation (Dabène, 2012). ISI was an economic system that acted as an emergency response to the collapse of the Great Depression and pushed Latin America to produce manufactured and industrial goods that were formerly imported (Frieden, 2006:302-306). It relied on the premise of economic nationalism, resulting in the closing to foreign trade to pursue rapid industrialisation through the development of a domestic manufacturing sector, encourage investment in both national and international background and further discourage imports (Frieden, 2006:309-312). From ECLA's recommendations, the Latin American Free Trade Association (LAFTA) and the Central American Common Market (CACM) were founded in 1960. Later in the 1960s decade, Argentina, Brazil, Uruguay, and Paraguay were invited to harmonise development and integration, signing the River Plate treaty (Dabène, 2012).

There are two shortcomings to this model of industrialisation. One is that while industry was large, it was not efficient enough to make the prices lower than world market levels (Frieden, 2006:306). Second, the ISI model relied on funds borrowed from abroad which deepened most Latin American' countries national debts, eventually leading them to a debt crisis due to the Volker counter-shock in 1979 (Hershberg & Rosen, 2006:6).²

This crisis led to the second wave of regionalisation when Latin American states searched for answers in the international system and undertook deep neoliberal reforms to attract foreign investment. The debt crisis was one of the three economic conditions for the expansion of the USA's neoliberal doctrines in the region, encapsulated in the Washington Consensus³ together with the rise of globalisation and the renewal of growth (Drake, 2006:37-39). Dabène (2012) points to this period as the "revisionist period", coinciding with the second wave of regionalisation, when Latin America adopted neoliberal means, funds, and institutions to alleviate the debt crisis and implemented economic policies recommended by the Washington-based financial institutions. Thus, during the 1970s and the 1980s decades, the disappointment over the industrialisation model led the promoters of integration to revise their agenda and replace some integration projects. LAFTA was replaced by the Latin American Integration Association (LAIA), and in the Caribbean region, the River Plate treaty was also revised. Finally, the Latin American Economic System (SELA) and Regio Group were founded for economic and political forums for consultation matters (Dabène, 2012). Hence, the second wave, the revisionist wave, corresponds to a period when integration projects and agenda as well development systems were revised.

The liberalisation promoted by the second wave of regionalisation, the revisionist period, opened the doors to the third wave, known as open regionalism. This implied a reinforcement of neoliberal policies, emphasising exports, free trade, and privatisations to lower public spending and debt and stimulate foreign investment (Drake, 2006:35-37). Thus, the decade was framed by a dominant ideology, neoliberalism. As the millennium came to a close, the third wave would culminate in the USA's trade initiatives like the North America Free Trade Agreement (NAFTA) during the Bush (senior) administration in 1990 but also the Common Market of the South (Mercosur), which intended the development of a unified market. Finally,

² Paul Volker, head of the Federal Reserve during the Carter administration. The Volker counter-shock is relative to a macroeconomic measure to avoid a rise in inflation keeping American interest rates at high levels until 1982 (Frieden,2006:372-378).

³ Washington Consensus: "Washington" referred to the US government and the international institutions guided by norms and principles of neoliberal policies such as macroeconomic discipline, monetary and exchange stability etc. (Drake,2006:37-39)

NAFTA would soon try to negotiate over an extension to the American market “from Alaska to Tierra del Fuego” (FTAA, 2003). This was the agreement for “*La Área de Libre Comercio de las Américas* (ALCA) or Free Trade Area of the Americas (FTAA).

During this period, Venezuela was deep in debt and tangled in an economic crisis due to the Volker Shock and the fragilities associated with it, which led to the search for foreign help and the implementation of structural adjustment policies in exchange for a loan from the IMF. This triggered several social upheavals, like *Caracazo*, a manifestation of the discontent population in Venezuela, as well in other Latin American countries like Bolivia or Brazil, triggering the election of leaders and movements from the political left or centre-left, respectively, Hugo Chávez, Evo Morales, Lula da Silva, as well as important parties, for example, *Peronismo* in Argentina and *Frente Amplio* in Uruguay (Vilas, 2006:232-237). This phenomenon would be called “Pink Tide” when numerous left, centre-left leaders were democratically elected in Latin America, emphasising socio-political and economic reforms and committed to poverty alleviation and the affirmation of social movements (Cole, 2012).

The Bolivarian Revolution acquired a political centre in Venezuela, in the form of the Chávez’s government-promoted “Bolivarian Constitution”, which would argue for a “Socialism in the 21st century”, embodying values which would ensure human development in a democratic society and an economy based on solidarity and reciprocity (Lebowitz, 2006:89-90). Muhr (2013) characterises it as the formation of a “revolutionary democracy”. According to Halliday (1994:94-132), “revolutionary states have the drive and the motivation to export their revolutions to gain legitimacy and domestic consolidation”. The revolutionary character of the Bolivarian Revolution has been characterised as promoting a transition from the individualist competitive identity established by decades of neoliberalism to a sense of community accompanied by a substantial reduction of social and economic inequality (Muhr, 2013:3-7). This goal assumed a regional expression in the collective attempt by the leftist governments that were part of the “Pink Tide” to promote a regional integration process that ensured forms of more inclusive governance and defended Latin American identity, as well as the region’s social, cultural, and economic development against what it conceived as the global threat of USA-led neoliberalism (Riggirozzi & Grugel, 2018). The Bolivarian Revolution thus turned to the international, regional context to consolidate its domestic transition away from neoliberalism and materialise its wider vision for the region.

Chavéz's Bolivarian Revolution, followed from the *Caracazo* turn of events, thus opened the doors to a transition on Latin American regional integration models, inaugurating what Briceño-Ruiz calls a form of "post-neoliberal regionalism" (Briceño-Ruiz, 2018:573-575).

According to Serbin (2011), the new regional projects in the context of the "Pink Tide" can be understood as the fourth wave of regionalisation in Latin America, distinguished by the displacement of trade liberalisation in favour of a political agenda in which the state has the lead in the regulation of the market.

As was mentioned above, the transition between waves could be explained through a paradigm shift. However, this fourth wave of regionalism is marked by its co-existence with two or more models of regionalism. Thus, within the fourth wave of regionalisation, on the one hand, there is the "post-neoliberal regionalism" model, in which integration becomes a means to answer the demand of citizens for social development (Riggirozzi & Grugel, 2018) and economic integration is put to the service to political ends, expressly for peace, democracy and sovereignty, as well as autonomy from international political powers (Dabène 2018:3-4) But, on the other hand, the fourth wave is also still marked by forms of regional integration favouring free-trade deals and international institutions favouring the neoliberal consensus, such as the Pacific Alliance. It is within this paradigm shift that ALBA is founded, in the presence of two intertwining and contradictory regional models. On the one hand, ALBA is an example of a counter-hegemonic model rejecting the neoliberal integration model. On the other hand, the Pacific Alliance presents an alternative to ALBA during the fourth wave of regionalisation. The Pacific Alliance is, according to Briceño-Ruiz (2018), the result of governments committed to free trade and, thus, to the open regionalism model while also presenting an alternative to the narrative of the non-capitalist model of integration inaugurated by the Bolivarian Revolution.

The literature on regionalism approaches can be distinguished between two phases, on the one hand, old regionalism and, on the other hand, the NRA approach. The new regionalism emerged in the advent of globalisation, thus introducing a greater variety of actors in regionalisation processes emphasising the role and notions of "regionness". The notions on "regionness" will be crucial to study ALBA, a regional institution founded in the context of Latin America's fourth wave of regionalisation as it considers integration through a multifaceted process.

The next chapter consists of the present study's theoretical framework, which will give an insight into Gramscian and neo-Gramscian concepts in order to understand the notions of hegemony and counter-hegemony and how a counter-hegemonic movement is formed.

Chapter 2: Theoretical Framework

2.1. Introduction

Hegemony is not a recent concept in the social sciences. There are at least three different meanings to the concept of hegemony in the social science lexicon (Robinson, 2006:166-178). Within the realist tradition in IR, hegemony is understood as the dominant position of a state in the international system. Within the world-systems theory perspectives, hegemony consists of a state's hegemonic power in the core region of the world-system. Finally, there is the Gramscian understanding of hegemony, which conceives it as a combination of consent and coercion that guarantees the social preponderance of a specific social class. From this perspective, hegemony is attained by a dominant class or social group through a combination of intellectual and cultural leadership backed up by repressive means (Robinson, 2006:166-178).

This chapter discusses the conceptual and theoretical framework that orientates the search for an answer to the main research question of this dissertation. This chapter is divided into three sections.

The first section seeks to understand Antonio Gramsci's interpretation of hegemony as a form of social domination (Robinson, 2006:166-178). According to Hoare & Sperber (2016), hegemony is a concept which relies on and deepens Gramsci's other major theoretical innovations. This includes the notions of the organic intellectual, organic crisis, and the metaphors formulated upon revolutionary strategies.

The following section discusses Neo-Gramscian approaches in IR and the way these derive concepts from Gramsci's work and apply them to an analysis of world politics. The main authors under consideration in this section are Robert Cox (1981, 1987, 1993), Stephen Gill (1993, 2008, 2014) and William I Robinson (2005, 2006).

The second section thus analyses Cox's understanding of Gramscian concepts and their application to IR, resulting in the conception of the internationalisation of the state. The advent of globalisation during the 1980s developed new questions concerning the process of transnationalisation of class and social struggles. Thus, the third section of the present chapter aims to explore and confront two approaches on the subject by focusing on a debate between Gill's (1993, 2008, 2014) and Robinson's approaches (2005, 2006) on the process of the transnationalisation of class in a globalised context.

2.2. Antonio Gramsci's Philosophy of Praxis

Antonio Gramsci's intellectual production can be divided into two main periods. The first period corresponds to a time before his incarceration (1914-1926), whose texts and writings were mainly oriented towards understanding the political events surrounding him. The second period of Gramsci's life corresponds to after his imprisonment (1926-1936). The author filled circa thirty "Prison Notebooks", enriching concepts and mechanisms first developed in freedom (Piotte, 1975:5-11).

When studying Gramsci's *Prison Notebooks*, the interpreter must have in mind that on this intellectual manuscript, Gramsci did not have the means to write coherently nor access to directly readable texts (Piotte, 1975:5-11). One must realise, these notebooks not only were beneath the eyes of tight censorship, but the author also wrote with his current knowledge, and according to books he could occasionally obtain from visitors during his imprisonment. This to say, while analysing the *Prison Notebooks*, the interpreter must collect and articulate the author's thought the way Gramsci himself could not in order to understand the historical context surrounding Gramsci through the tools he provided (Hoare & Sperber, 2016:20-23).

The first notion to grasp is the understanding of the "philosophy of praxis" and Gramsci's view of historical materialism. Gramsci's philosophy of praxis seeks to avoid a dichotomic debate between materialism and idealism, thus positioning philosophy into a "situated praxis". This represents a dialectical unity of society and a human critical-practical activity which implies that while humans are subject to the influence of social circumstances, they are themselves able to modify these conditions (Hoare & Sperber, 2006:113-114). Thus, as Hoare and Sperber (2016: 113) summarise, to Gramsci, human knowledge emerges from "historical becoming, converted into praxis", thereby affecting the flow of history.

Gramsci's philosophy of praxis represents an attempt to avoid dichotomies between economism and idealism, describing history as an ensemble in which ideas and material conditions are always bound together and mutually influenced (Cox, 1993:55-58). History reflects the product of human thought because everyone can become a philosopher in the sense that every person can create a mental connection to a social environment. However, this mental connection with a social environment is also affected by material circumstances. Therefore, Gramsci's conception of history, together with his main theoretical concepts, is built around the harmonisation between material conditions and intellectual labour (Hoare & Sperber, 2006:83-86).

A historical bloc is a key concept in Gramsci's work. It consists of a dialectical concept that expresses the larger unity between its interacting elements (material conditions and ideas), connected within a superstructure (Gill, 1993:55-59). This concept represents Gramsci's rejection of reducing historical materialism to either economism or idealism, embracing the juxtaposition of both ideas and material conditions that mutually influence each other (Cox, 1993:55-59).

Everyone is politically active in the sense that every human being contributes to modifying the social environment in which they find themselves. Therefore, politics becomes a moment in every human's life. Gramsci's theory of politics consists of the study and mutual influence between the following elements, "civil society", "political society", and "State" (Hoare & Sperber, 2016:117).

Civil society comprises all social relations and institutions that do not participate either in the economic reproduction of society or the life of the State (Hoare & Sperber, 2016:55-58). It integrates "private" institutions, not only associations of citizens, political parties, unions but also cultural institutions like the media or publishing houses, as well as the Church. Gramsci conceived civil society as the terrain of struggle of ideology and cultural consent.

If, on the one hand, civil society is the space of persuasion via open debate, political society, the second element of the trilogy, is the domain of coercion. The political society holds the means of violence, the monopoly of the legitimate use of violence embodied in the State's repressive functions such as the military or police force and the juridical-administrative force (Hoare & Sperber, 2016:123-124).

Finally, the last element of Gramsci's triad is the State. There are two possible ways to conceive the State. In the first understanding of the concept, Gramsci considered the State to be an extension of the concept of political society, a repressive mechanism. From another perspective, and most interesting for this dissertation, the State is conceived of as a structure that embraces the reciprocal relation between political society (the space of coercion) and civil society (the space of consent) (Hoare & Sperber, 2016:56-58). This second understanding sees the State as an 'extended State', as the unity of both political and civil society embodying the state's complexity in its full expression of practical and ideological activities through which the ruling class maintains dominance and manages to acquire consent over those whom it rules (Gramsci, 1971). It is pointed by Hoare & Sperber (2016:55-58) that employing the word "State" is strategic in the sense that it purposefully stresses the relations of power between

“private” civil society and “public” political society, thus, affirming the part that civil society plays in all social life.

The notions of the trilogy civil society, political society, and State underline Gramsci’s conception of hegemony. These concepts are organically interrelated. From Gramsci’s perspective, something being organic means that it stands in a privileged or necessary relation to the economic structure of society (Hoare & Sperber, 2016:57).

The main agent exercising the relationship between state and society are the “organic intellectuals” who illustrate the dialectical relation to the process of historical change (Gill, 1993:23-24). They are organic in the sense that they are tied to a class that is emerging in the field of production, the organisers of a way of life that constitutes society at a given point in time (Hoare & Sperber, 2016:57-58). Organic intellectuals are the economic, social, and cultural organisers of the direction and domination of a class over society (Piotte, 1975). The organic character of an intellectual depends on his or her close connection to the organisation of which he or she is a member or the class he or she represents. It thus depends on the task the intellectual occupies within civil society or political society (Piotte, 1975:13-34).

Organic intellectuals assume a crucial function in the homogenisation of a conception of the world surrounding civil society as they perform and sustain the mental images of a class of a historic bloc into a common identity (Cox, 1993:55-58). As the organisers of social activities, their most crucial role remains in forming, maintaining, and renovating the historical blocs.

The intellectual also plays a crucial role in political struggle. Gramsci’s philosophy of praxis is connected to the notion according to which an individual engages with the world and participates in its transformation. The intellectuals, as the organisers of the social life, can either have the function of homogenizing civil society towards the maintenance of a historic bloc (hegemonic intellectual) or, on the opposite side, homogenise a social group to acquire class consciousness and prepare to enter the historical stage as a collective actor (counter-hegemonic intellectual) (Hoare & Sperber, 2016:36-39).

Hegemony, to Gramsci, is understood as being built, on the one hand, on consent, through the power of compromises and concessions established between the various social classes within civil society and, on the other hand, on coercion, exerted by political society through administrative, juridical, and military constraint. Hence, according to Hoare & Sperber (2016:122-125), there is a clear dynamic between consent and coercion in the definition of hegemony.

Hegemony is thus maintained through a combination of coercion and consent (Robinson, 2006:166-178). The presence of a rooted historical bloc means that a dominant class in a social formation or State (in the extended understanding of the concept) maintains its social domination through the propagation of a common culture and through the action of the main organiser agents, the organic intellectuals (Cox, 1993:55-58). This consensual element in hegemony appears in the form of common sense, which is understood as the acceptance of a particular conception of the world, organised by the rulers, consented by the ruled. This common sense is then backed up by the repressive apparatus of political society (Hoare & Sperber (2016:122-125).

Gramsci's concept of hegemony derives from two historical strands. First, the notion of extended state derived from the historical analysis of situations in which the bourgeois hegemony was most complete, capable of making concessions to subordinate classes in the form of social democracy. This allowed the perseverance of capitalism while making it acceptable to both workers and bourgeois society. The second strand derives from Nicolo Machiavelli's *The Prince*. Fundamentally, hegemony is understood by the Machiavellian problematic of power as a balance of the relation between force and reason (Maquiavel, 2012). Where Machiavelli looked at the individual Prince, Gramsci understands the presence of a modern Prince, materialised in the revolutionary party engaged in a continuous dialogue with its own base of support. From this perspective, the possibility of a counter-hegemonic movement by subaltern classes within civil society depends on their autonomous capacity from the ruling classes, their organic intellectuals, and the dominant common sense in order to learn how to become themselves an autonomous leading force. Fundamental in this context is the role of the subaltern classes' own counter-hegemonic organic intellectuals (Buttigieg, 1995).

The capacity of the subaltern classes to break with the common sense prevailing in civil society, according to Cox (1981), may originate the formation of rival ideas, institutions and material capabilities that coalesce into a counter-hegemonic project through the creation of alternative social forces to the dominant social class. This project may turn into an opportunity to develop the organisational capacity to establish a rival historical bloc to the prevailing hegemony (Morton, 2000).

Revolutionary struggles thus imply the development, within the prevailing hegemony, of a rival structure strong enough to replace the first. To understand how a rival counter-hegemonic historic bloc might substitute the hegemonic historic bloc, Gramsci analysed the revolutionary

experience in Russia in 1917 and what lessons could be drawn from it for the task of a Revolution in Western Europe.

In this context, Gramsci was fond of using military metaphors for revolutionary and political struggles and introduced the distinction between a war of movement and a war of position. Gramsci illustrates this struggle through a comparison between the revolutionary struggle in the East, the Bolshevik revolution in 1917, which contrasts with the revolutionary struggle in the West:

In the East, the State was everything; civil society was primordial and gelatinous; in the West, there was a proper relation between the State and civil society, and when the State trembled, a sturdy structure of civil society was at once revealed. The State was only an outer ditch, behind which there stood a powerful system of fortresses and earthworks (Gramsci, 1971:238).

Gramsci argued that the Revolution in Russia succeeded as a war of movement because, although powerful in coercion, it was possible to make this state succumb to a determined revolutionary civil society to whom it was up to make a new state that would mould a society in its own image (Cox, 1987:204). However, this could not be recreated in the West given that the dominant classes ideological influence over civil society was much more significant and, even if the State were to fall into a rapid war of movement, it would leave behind fortifications in the form of social and economic power (Cox, 1987:182-183). Thus, the appropriate revolutionary strategy, in this case, would be a long-term approach, the war of position, whereby progressive forces can cohere into more integral counter-hegemonic blocs, to engage in intellectual and political struggle (Gill, 1993:52-53). This strategy is essential due to the sturdiness of industrialised Europe's civil societies which impede revolutionary engagement from a voluntaristic character.

Gramsci stresses the lack of revolutionary strategy in the then-recent revolutionary experiences, seeing how the war of movement became the exclusive strategy. This resulted in an excess of spontaneous action instead of a long-term struggle of a war of position consisting of a long-term approach through permanent persuasion to form a national-popular counter-hegemonic bloc (Hoare & Sperber, 2016:59-60). The war of position would result in the development of a new conception of the world at the ethic-political level whilst also transcending partial economic interests (Morton, 2000).

The war of position ultimately implies a constant ongoing struggle to build alternative institutions and alternative intellectual resources within an existing society while uniting workers and other subordinate classes. It seeks to actively create the social basis for a counter-

hegemony within an established hegemony while resisting pressures and concessions within the operative hegemony (Cox, 1993:52-53). Slowly, this strategy builds a rival historic bloc to the prevailing hegemony, a class-based counter-hegemonic bloc in civil society until the conquest of power in the state becomes an achievable goal (Cox, 1987:205).

Having discussed some of the main concepts in Gramsci's thought, the second section considers how these have been appropriated and operationalised into an analysis of world politics by the neo-Gramscian approaches in IR.

2.3. Neo-Gramscian Approaches

Robert W. Cox differentiated himself from the mainstream, ahistorical conceptions of hegemony and developed a historical materialist approach towards a critical theory of hegemony, world order and historic change in an IR framework (Bieler & Morton, 2004). Cox's theory (1987) focuses on the close relationship between production and the exploitative character of social relations. This conception contrasts with the realist and liberal traditions of IR theory, which developed an unchanging, ahistorical conception of the state and the inter-state system that aspired to universal validity (Bieler & Morton, 2004).

Cox's (1987) first innovation concerns the development of a dialectic, critical theory of hegemony, world order and historical change, oriented to questioning the prevailing hegemonic world order (Bieler & Morton, 2004). This approach opposes problem-solving IR theories and their static, ahistorical approach, which focuses on resolving problems in specific configurations of social relations. From the perspective of traditional IR approaches, the conception of hegemony represents the dominance, backed up with active domination, of a state or group of states. On the other hand, the critical approaches describe hegemony from a historical approach, understanding it as the exercise of leadership within historical blocs (Robinson, 2006:166-178).

Cox develops this conception within his main intellectual work, *Production, Power and World Order* (1987). This work is divided into three main parts. The first concerns the classification of world production into patterns of production relations. These patterns, denominated modes of social relations, can be understood as the close relationship between production relations and power. The second part focuses on understanding how different configurations of these social relations produce different forms of states that result from the interaction of both the relations of production and the nature and the activity of international forces. Finally, the third part, and here stands Cox's true innovation, analyses of how social relations of production

create forms of state and, consequently, originate structures of world order that permit the patterns of production relations and the forms of state to expand externally, beyond the states' formal borders (Cox, 1987:1-9).

The purpose of Cox's exercise of mapping social relations on both national and global levels, and hence the global formation of hegemonic historical blocs, is to study the potential for structural change in the hegemonic world order through the development of alternative, counter-hegemonic historical blocs. When these counter-hegemonic social forces acquire autonomy from hegemonic organic intellectuals, ultimately developing class identity, their potential to become a counter-hegemonic bloc emerges (Cox, 1987:356-358). It is important to remind, however, that Cox's notion of intellectual is similar to Gramsci's in the sense that the intellectual belongs to a social stratum including many types of people, fulfilling certain cultural and political functions that exist apart from the material reproduction of society (Hoare & Sperber, 2016:36-39). Thus, intellectuals contribute to the process of hegemonic or counter-hegemonic formation through visions of the world that either legitimate the existing hegemony or create class consciousness in the direction of a counter-hegemonic movement.

Cox's critical theory thus focuses on the dialectical interaction of social relations and how these form a continuous historical process of social change. Transporting this debate to an IR framework means that Cox (1993:64-65) aims to understand how social forces can be influential to structural change at the national and inter-state levels. In the first place, this approach avoids the reduction of the state system to the world economy, indicating direct criticism of Wallerstein's world-system theory. Additionally, Cox's analysis of historical blocs enables the mapping of the state system and the production system. Finally, it allows a historical, dialectic confrontation of social forces to study the potential "countless multitudes" of world systems (Cox, 1987:356-358).

The first understanding Cox wanted to make clear is that hegemony, at a world level, cannot mean hegemony in the sense of world-domination in the ahistorical perspective of IR's most mainstream traditions. To become hegemonic, a state would have to establish and protect a world order which was universally consented to in conception. Therefore, in an inter-state system, hegemony does not emerge from direct exploitation but from compatible interests that arise from a global civil society that operates on a world scale (Cox, 1993:59-62).

According to Cox (1993), a world hegemony is when a national hegemonic historical bloc (comprising a dominant set of social forces at the national level which, via coercion and consent at the level of political and civil society, exercise hegemony over subaltern classes and that

national state-society complex) expands outwardly towards the international sphere reproducing national patterns into different states. Thus, the countries on the receiving end, without undergoing the same historical process as the hegemonic state, will adopt its political and economic models. This world hegemony is exercised through international institutions that combine a repressive function and a consent-building function, expressed in the form of an emergent consensus around “universal” norms, institutions, and mechanisms for the regulation of the world which prescribe general understandings, protocols, norms, and behaviours that each state should abide by and which, ultimately, support the hegemonic mode of production and model of State.

The hegemonic world order thus manifests itself through international institutions that embody the rules and facilitate the expansion of the hegemonic states’ social forces, thus legitimating the norms of world order while absorbing and rejecting counter-hegemonic ideas (Cox, 1993:62-64).

Quoting Robert Cox (1993:65), “changing world order begins with the long, laborious effort to build new historic blocs within national boundaries”. A counter-hegemonic historical bloc can thus be formed when a subordinated class establishes hegemony over other subordinated classes at the national level. This process requires the involvement of all parties in its construction, including the leading classes, to permit the reorganisation and development of a new conception of the world (organised by the intellectuals) through the continuous criticism and dialogue between classes (Rupert, 2006:90-101). That is, the organic intellectuals need to interact with subordinate groups where dissent has been established and make them candidates for inclusion. Because hegemony depends on consent (as well as coercion) (Buttigieg, 2006), counter-hegemonic intellectuals, holding a certain autonomy relative to class, have an essential role in the construction of a counter-hegemony through the development of new mental images and organisations which bind together members of different classes into a common identity (Cox, 1993:64-65).

However, the process of counter-hegemony described by Robert Cox (1993) has recently been contested in the Neo-Gramscian approaches within the IR framework. Issues such as the processes of class transnationalisation and globalisation have led authors such as Robinson (2005, 2006) and Gill (1993, 2014) to propose a development of Cox’s theoretical framework to study the transformations in the global political economy since the 1970s decade and their impact both on the formation of the hegemonic world order and the possibility of the emergence of counter-hegemonic movements.

2.4. Class Transnationalisation: William Robinson and Stephen Gill

As mentioned above, Cox stated that structural world order transformation starts with the laborious task of building a national historical bloc which then could have the hegemonic potential to expand into other countries through consensual understandings and conceptions of the world, accompanied by the establishment of international institutions and other mechanisms to promote an alternative mode of production and model of the State (Cox, 1993).

In historical terms, the post-World War II period was understood as a transition time when states adapted their economic systems to the requisites of the new capitalist world order promoted by USA hegemony (Cox, 1987:215). Simultaneously, the new world economy resulted in the growing socialisation of aspects of social life accompanied by the disintegration of previous forms of identity and interests. This restructuring process is interpreted as a part of the internationalisation of a historical bloc of social forces to create the world order anew (Gill, 1993:9).

Cox (1987:254-257) recognises in this transition period a shift in the configuration of social forces and the development of the internationalisation of the state. Putting it simply, it is understood as a shift in the centre of gravity from national economies to the world economy. Within an international economic framework, the state assumes the role of an intermediary agency between the global economic environment and the domestic economy (Cox, 1987:254-257). The states' accountable role rests within defending the domestic economy prioritising it over external forces. Ultimately, with the internationalisation of the state, which is understood to have happened since the 1950s decade, the state's accountable role was left within an awkward halfway point and in need to reach a compromise. On the one hand, states were accountable to domestic governments for the maintenance of welfare and economic performance. On the other hand, they had to be accountable to institutions of the world economy (Cox, 1987:257). In other words, states became the instruments on the adjustment of domestic policies to the demands of the global economy, the transmission belts from the global into the national (Cox, 1983).

Thus, the post-war period facilitated the emergence of a globally integrated economy while the state's agency on the task of political regulation became compromised (Gill & Law, 1993:96-97). The construction of this international historical bloc was rooted in an economic model based on a growth-oriented regime of accumulation and economy of mass consumption. Simultaneously, normative structures of society were legitimised through the normalisation of

a conception of the world order and the state based on concepts such as liberty, liberal democracy, modernity, welfare and “the end of ideology” (Gill, 1990:41-51).

However, since the 1970s, the developing globalisation process produced a profound restructuring of world order, which resulted in the rise of transnational capital and the supersession of the nation-state system as the organising principle of capitalist development (Robinson, 2002).

According to Robinson (2002), the globalisation process stands in the fourth and current period of a global capitalist restructuring process. The first period (1492-1789) corresponds to mercantilism and primitive accumulation within Europe; the second stage, from 1789 until the late 19th century, is marked by the industrial revolution and the forging of the nation-state; the third, from late 19th century until the 1970s decade, saw the consolidation of a single world market and the nation-state system into which world capitalism became organised. Finally, as mentioned above, the fourth and current epoch began with the global economic crisis of the 1970s, accompanied by a deep structural change of world order. It marked a threshold between the structures of a recent past and an unclear emerging future (Cox, 1987:273-274).

According to Robert Cox (1987), the structural changes in world order influenced the change in the forms of state in the globalising world. These changes can be summarised in three points: (i) a weakening of central authority and a virtual abandonment of the central regulatory functions of the world economy; (ii) a loss of credibility in the leadership of the superpowers; and (iii) a heightening of competitiveness for raw materials, capital equipment and manufactured goods. These profound changes, beginning around the 1970s economic world crisis, led to a rethinking of historical structures and institutionalised consensual power relations, which now appear less solid and stable, which opens the historical possibility for the reconstitution of social relations at both the national and international levels (Rupert, 2000:172-175). The global recession, allied with the cumulative internationalisation of production and the integration of global economic forces, meant that the existing historical blocs were being undermined, and a new historic bloc was emerging (Gill, 1993:33).

The most noticeable trait of the present organic crises is the newfound mobility of capital which implies the worldwide decentralisation of production and the centralising command and control of the global economy by transnational capital. Hence, the emergence of a global economy, meaning that globalisation is unifying the world into a single mode of production and bringing about the organic integration of different countries and regions into a global economy and society. This constitutes the material basis for a process Robinson (2002, 2006) describes as of

transnational class formation, conceiving of the historical emergence of a transnational capitalist class. Global class formation takes place through national-capitalist classes converging externally with other national classes at the international level. They are involved in globalised production and management of globalised circuits of accumulation, resulting in the internationalisation of capital and civil society. The transnational class is thus a product of this interaction of national internationalised classes, forming new cleavages within local, national, and regional communities (Robinson, 2006:166-178).

According to Robinson (2006:166-178), this transnational historical bloc comes into being via various economic and political forces whose policies are conditioned by the global structure of accumulation. The dominant transnational capitalist class within the present hegemonic world order are the owners and managers of transnational corporations and private financial institutions who manage transnational capital. This includes bureaucratic managers and technicians from agencies such as the IMF, the World Bank, and other transnational forums. This historical bloc is further composed of organic intellectuals consisting of charismatic opinion-makers and leaders who provide ideological legitimacy to the dominant world order and highly paid cosmopolitans who exercise very little power by a small layer of the middle class. At the bottom of the historical bloc, there is a social base beyond any exercise of power over which the dominant class imposes their projects and ideology through consent. Those who do not identify with the hegemonic project, whether through material conditions or ideologically, are contained or repressed (Robinson, 2006:166-178).

Thus, Robinson clarifies that while the internationalised social forces are still rooted in national states and circuits, the globalised transnational classes are rooted in transnationalised capital (the product of the newly gained mobility of capital). This results in a whole new phase in humanity's history which is to supersede the state completely.

Nevertheless, this vision is not shared amongst all within the neo-Gramscian tradition. Stephen Gill and David Law have studied the transnationalisation of class and question Robinson's thesis of the complete disconnect between transnational classes and their national origins. Gill's (2014) argument is developed in the context of his study of the expansion of the world market in the post-cold war period, which is associated with a phenomenon he denominates as "New Constitutionalism" (Gill, 2014:29-42).

New Constitutionalism recognises capital's new gained mobility, as transnational corporations appraise the legal circuits to analyse the "political risk" (such as production costs, labour relations, political stability, and financial concessions offered by countries). As a result,

governments tend to accommodate these corporations in the form of economic policy, as well in the form of investment decisions of transnationally mobile capital (Gill & Law, 1989).

Therefore, the New Constitutionalism doctrine stands for the legal and political framework, which allows a free market and the facilitation of neoliberal forms of global economic integration and the extension of the world market (Gill, 2014:6). According to Gill (1993:10), this new form of law seeks to place restraints on the democratic control of public and private economic organisations and institutions, closely linked to “disciplinary neoliberalism”, which serves as the means to restructure political economy as well as social practices through norms, institutions, and discourse. Thus, Gill (2014:7) proposes the concept of New Constitutionalism to refer to three interconnected processes. First, the uneven emergence of a constitutional governance structure for the world market aimed to operate at the national, regional, and global levels. Second, the reshaping of social forces results in a shifting configuration of forms of state through legal means. This purposefully aims to extend capitalist markets, their release from political control; And, finally, the implementation of mechanisms associated with accumulation patterns.

In short, New Constitutionalism intends to guarantee the freedom of transnationally mobile capital regarding different socio-economic spaces, which consequently transforms national political leaders’ duty to be accountable to both electorates as well as to transnational market forces. This project ultimately affects nation-states sovereignty. New Constitutionalism aims to warn that macroeconomic policy is limited and constrained by transnational capital. In this context, more powerful states, like the USA, as well as regional associations, such as the European Community, have greater room for manoeuvre than smaller and less powerful states on the protection of their domestic interests. Consequently, Gill (1993:11) reaches the conclusion that sovereignty is unbalanced in the emerging world order of transnational capital. This results from the dominant position New Constitutionalism permits the most powerful states to develop, and through which they are able to exercise pressure on the less powerful states to adopt disciplinary neoliberalism. This situation is perceived by Stephen Gill as a situation of supremacy rather than hegemony (Bieler & Morton, 2014).

Supremacy is understood as a rule by a non-hegemonic bloc of social forces which still exercises dominance over fragmented populations. Supremacy is distinguishable from hegemony in the sense that while hegemony implies the construction of a historical bloc, exercising an active and legitimised system of rule, presupposing an alliance of coercion and consent in a general or universal interest, a supremacist bloc is built on the improbability of

building a hegemonic historical bloc at the global level (Gill, 2008). Considering this, supremacy materialises in the effort to construct a legitimised rule of law that supports a certain mode of production as well as a leading nation-state. However, it can be torn down through the emergence of dissent in the subordinated classes in the form of a coherent opposition that provokes a crisis of authority.

Thus, New Constitutionalism is a governance and geopolitical project that aims to secure favourable conditions for capital accumulation in the contemporary period. However, it lacks a hegemonic quality in the sense that an anti-capitalist project may arise to challenge the structural power of capital over those fragmented populations (Gill & Cutler, 2014:15).

What does a supremacist bloc look like? The supremacist bloc of social forces in the present era reflects itself within the transnational historical bloc of social forces. Its nucleus contains G7 state apparatuses and transnational capital associated with privileged workers and smaller firms. This bloc of forces has emerged through the discipline of macro and micro dimensions of power, that is, the structural power of capital to constrain and incentivise material conditions to promote uniformity and obedience within parties and organisations (Gill, 2008:126). Supremacy consequently has local variations because countries with weak or controlled labour movements tend to attract investment at the expense of countries with independent labour movements (Gill & Law, 1989).

This process, consisting of the development of material conditions for capital accumulation and the promotion of uniformity of social circuits, is characterised as the means of the present supremacist bloc to exercise power, denominated disciplinary neoliberalism. It simply refers to the discourse of global economic governance reflected in the policies of the Bretton Woods organisations and the constitutional regional arrangements, such as NAFTA as well as the regulatory framework of the World Trade Organization (WTO) (Gill, 2008:138-142).

Summing up, New Constitutionalism is a political project that attempts to make transnational neoliberalism, within a liberal democratic capitalism political system, the sole model for future development. The new mobility of capital provided the means for the emergence of a transnational capitalist class that promoted the creation of a supremacist bloc of social forces utilising it as means to limit and incentivise economic policy through disciplinary neoliberalism (Gill, 2014:138-142). Consequently, states, as well as economic institutions, will have a dominant role in the present framework.

What are the main differences between these authors' ideas on the transnationalisation of capital and the consequent formation of a transnational class?

Robinson goes back to Gramsci to argue that “we cannot speak of hegemony of a state, hegemony is exercised by social groups, by classes or class fractions (...)” (Robinson, 2006:170). This citation is expressive of Robinson’s intention to move neo-Gramscian thought away from state-centric interpretations. He argues that a historic bloc represents the basis of consent for a certain world order which means hegemony is a form of social domination in which class is created within civil society’s institutions, social relations, and ideology (Robinson, 2006:166-178). Thus, social classes are the historical agents, acting inside and outside the state’s configuration. The state merely enforces and reproduces the class relations and practices embedded in states (Robinson, 2002).

Therefore, when transporting Gramsci’s mechanisms to reach answers on the transnationalisation of class, Robinson argues that the present era is creating and encouraging conditions for a shift in the locus of class and social group formation from the nation-state to the global system. In this sense, for Robinson (2006), as opposed to Gill (1993) or even Robert Cox (1987), it is not possible to conceive of a potential global hegemony through the transnationalisation of class in a state-centric analysis.

A transnational state is understood as but a moment of power relations, with constellations of class forces and class relations bound to capitalist globalisation and the rise of a transnational class embodied in international institutions. Class, being the relevant historical agent in the present era, represents the new capitalist class which comprises the owners of the leading means of production embodied in the transnational corporations and private financial institutions. The transnational class is distinguishable from the national class in the sense that, globalised classes, being involved in globalised production and the management of global circuits of accumulation, the main function and identity of this class is placed spatially and politically in the global system above national and local territories (Robinson, 2002). Thus, within the emergence of a transnationalised historical collective, the transnational class exercises power through a transnationalised state apparatus to reproduce social forces relations that are themselves embedded in the global circuits of accumulation (Robinson, 2002).

Robinson (2006:166-178) stressed that the conceiving of a potentially emergent transnational hegemony must be centred on social classes as opposed to states or other specific geographies. Therefore, he directly clashes with Stephen Gill & David Law’s (1989) conception, which argues that the emergent transnational class has a geographical centre in a group of capitalist countries led by the United States.

New Constitutionalism is a state-centric framework in the sense that supremacy is installed within the state through disciplinary neoliberalism, which allocates less powerful states a position in which their sovereignty is weakened. Thus, the US government can use their access to its vast market as a lever of power, capable of reshaping the international business climate and subjecting other nations to the discipline of New Constitutionalism. (Gill, 2008:141).

Thus, Robinson (2006) considers supremacy to be a state-centric concept that is focused on the USA's position in the world, strengthened due to the 1970s crises and the consequent advent of globalisation. However, according to Gill (2008:142), transnational hegemony is indeed American-centred within global neoliberalism because the USA's situation is reinforced in a hierarchy of pressures and constraints on government autonomy that vary according to national and regional institutional capabilities and the degree of integration into global capital.

In short, Robinson aimed to explain the process of transnationalisation of class from a purely Gramscian conception; therefore, hegemony is conceived of as being built from social forces. The globalisation process is creating conditions for a shift in the site where these classes are formed, from the nation-state to a globalised setting. Meanwhile, Stephen Gill and David Law conceptualised "New Constitutionalism" from the observation of international law and how it can influence the state's apparatus. New Constitutionalism conceives the State as the site of formation of supremacy within other states' without necessarily becoming hegemonic.

When seizing the described theoretical frameworks to the study of ALBA, Stephen Gills' and David Law's approach on New Constitutionalism appears more adequate. As Stephen Gill (2014:138-142) mentioned, supremacy can allocate powerful countries to dominant positions within the globalised world although lacking hegemonic qualities. This absence may permit the emergence of a challenge, aiming to reverse growing inequalities of power and the decline in the circumstances of most people (Gill, 2014:15). This challenge is materialised in the form of anti-capitalist projects to the structural power of capital at any spatial scale (Gill, 2014:15).

The following arguments will be discussed in the next chapter. Hugo Chávez presents the Bolivarian Revolution as the possibility of realising the dream of Simón Bolívar, the union of Latin America (Cole, 2011). This revolution has developed in two different phases (McCarthy-Jones, 2014:48): The first phase (1994-2004) is focused principally on domestic issues relating to poverty and inequality, as well as great political challenges such as the attempted coup d'état on Hugo Chávez's administration who sought to consolidate power. The second phase (2005~2013) involves a shift from domestic matters to a focus on foreign policy at both the regional and international levels. Thus began the institutionalisation of ALBA, which aimed to

break with the United States' dominant position in Latin America (acquired through what can be described as a process of New Constitutionalism) and the reinforcement of solidarity through regional integration. The Bolivarian Revolution is thus understood in the present study as the anti-capitalist movement, which can gather force enough to challenge neoliberal supremacy in Stephen Gill's approach on New Constitutionalism. Favouring this approach is due to the Bolivarian Revolution's origin in Venezuela, thus having a national base that sought to transnationalise itself through Latin America's regionalism in the 21st century.

Thus, although Robinson clashes with Gill affirming it is not possible to build a transnational hegemony through states, in this case, for the present study, the Venezuela Bolivarian Revolution indeed can be understood as the attempt at consolidating a counter-hegemonic movement that, initially structured on a national basis, then sought to transnationalise itself through ALBA's institutions. This argument will be further analysed in the next chapter, where contextualisation is due, as well as the analysis on the leading authors in the literature on ALBA, Thomas Muhr.

Chapter 3: ALBA in Context

3.1. Introduction

The present chapter focuses on ALBA, the literature relative to it and the effort of questioning ALBA. This chapter aims to explore the authors who have already studied ALBA and what are their main contributions but also to point their weaknesses, and further express the approaches the present study aims to engage to research ALBA. The chapter also discusses the methodology used to answer the main research question orientating this study.

Thus, the present chapter is divided into three sections. The first section aims to discuss ALBA within the fourth regionalisation wave placing it in its unique historical context. This framework will place ALBA within the Pink Tide and, more specifically, in Venezuela's Bolivarian Revolution. The second section focuses on the literature on ALBA itself, exploring how authors like Thomas Muhr and Ken Cole contributed to this study by approaching ALBA through a neo-Gramscian perspective while seeking to highlight some limitations of their analysis. This section also opens questions on ALBA through the study of Jennifer Martinez's analysis on ALBA's Council of Social Movements "counter-hegemonic double-turn". To conclude the chapter, the third section engages in the construction of a methodology that suits the present study, exploring the Gramscian concepts and mechanisms of common sense and how language is employed to consolidate hegemony. Thus, the methodology focuses on Critical Discourse Analysis (CDA).

3.2. Studies on ALBA

The literature on ALBA is predominantly focused on Venezuela and the events associated with the Bolivarian Revolution, which are frequently accompanied by focused analyses on the importance of its intellectual and political author, Hugo Chávez (Cole, 2011; Muhr 2010). However, it is important to enrich this context with a framework of Latin America's regionalism (Dabène, 2018:51).

ALBA was constituted in 2004, during what has been called the fourth wave of regionalisation in Latin America (Dabène, 2018:51). The third phase of Latin America's regionalism came to be characterised by the opening of national markets to neoliberal policies with an emphasis on exports and free trade under the Washington Consensus (Drake, 2006:33-39). The recognised failure of pro-market policies and the anti-political, neoliberal leaders of the 1980s and 1990s meant that Latin America's left parties and left-wing movements had to reimagine the very

constitution of a possible democratic society (Hershberg, & Beasley-Murray & Cameron, 2009). As such, there was an apparent lack of commitment to democratic agreement, accountability, and deliberation. Thus, Latin America's Left Turn is described by Hershberg & Beasley-Murray & Cameron (2009:320) "as a multiplicity of disparate efforts to (...) re-found the constitutional order or social pact".

This left turn was reflected within the Latin American "Pink Tide" phenomenon. These left-wing governments searched for an alternative beyond neoliberalism and the open regionalism formula. The fourth wave is thus characterised by the questioning of the "common sense" of the third wave, and the development of a conception of regional economic integration as an instrument to be put at the service of goals such as peace and democracy and to the Latin American population's well-being (Dabène, 2018:53). It is characterised by Dabène (2018:53) as a "counter-hegemonic turn". Leaders such as Chávez, Lula, Morales and Fidel Castro are supposed to embody this counter-hegemonic turn, which finds its international expression in the constitution of ALBA and UNASUR with the expressed purpose of balancing US hegemony on the continent.

The Bolivarian Revolution is frequently characterised as having two different stages (McCarthy-Jones, 2015:48). The first phase happened on the Venezuelan national stage when Hugo Chávez was first elected in 1998 and promised a total political transformation. Chávez promoted the creation of a National Constituent Assembly to create a new constitution for the Fifth Republic of Venezuela, which would erect a consultative process with various representatives of Venezuelan society (McCarthy-Jones, 2015:48-49). This was the base for the creation of new spaces of participatory democracy (Lubbock, 2018:174). However, it was not until the end of 2001 that Chávez started to seek the fulfilment of the Bolivarian Revolution through forty-nine laws aiming at social policy and the nationalisation of key sectors, such as the agricultural and the hydrocarbon sectors (McCarthy-Jones, 2015:48-49). This triggered the rapid mobilisation of the opposition through a general strike in 2001 with the *Petróleos of Venezuela* (PDVSA) and the *Federación de Cámaras y Asociaciones de Comercio y Producción* (FEDECAMARAS) as the main actors. Eventually, a short-lived coup was organised against Hugo Chávez's presidency in 2002, which ultimately reinvigorated it and further consolidated his power. Furthermore, mistrust of the United States was installed and established Chávez as a fighter for not only Venezuelan but the whole Latin American and Caribbean regions' autonomy from this world power.

These events led to the second phase of the Bolivarian Revolution, which materialised in the strong focus on foreign policy issues at both the regional and international levels. In 2004, Venezuela's government called for a "new strategic map" which introduced the notion of 21st century socialism (Muhr, 2013:7-8) and radicalised Venezuela's foreign policy towards a break of bilateral relations with the United States and the promotion of integration and solidarity across the region through a process of Latin American institutionalisation (McCarthy-Jones, 2015:53-61). Two great levers favoured the idea of ALBA in this context. First, the strategic alliance with Caracas, a bond with considerable economic and political importance to both countries (Gott, 2011: 314-315). And second, the failure of the proposed ALCA during the Summit of the Americas in 2003, which included Brazil, Argentina, Paraguay, Uruguay and, of course, Venezuela, in the rejection of the ALCA project to open the Americas' market "from the Arctic to the Antarctic" (FTAA, 2003). This rejection revealed the dissent around the Washington Consensus and a changing tide in Latin America's models of economic and human development (McCarthy-Jones, 2015:53-61).

ALBA became an international, regional project focused on civil society, social movements and anti-imperialist ideology, which came to be characterised by many authors, such as Thomas Muhr (2013) and Ken Cole (2012), as an attempt at "counter-hegemony". ALBA's agenda was argued by its advocates to serve a higher purpose in the form of the struggles for peace, solidarity, democracy and for the strengthening of sovereignty and autonomy from the international system's economic and political powers (Cusack, 2018). ALBA's idea of pan-Latin-Americanism is not a recent one but certainly one that sought to change Latin America's regionalism for the twenty-first century.

According to Robinson (2005:15-18), after the collapse of the Soviet Union, during the 1990s, with the defeat of the organised left and social movements worldwide, there was a slowdown in what concerns critical thought when faced with the triumph of global capitalism. Critical studies are concerned with reflexivity, acknowledging the historical character of intellectual labour that reflects the prevailing status quo and criticising existing power structures while seeking to replace them with more just and equitable social arrangements (Robinson, 2005:11-12). When exercising this type of knowledge, we can further problematise social reality, and question the collective agents involved in society, intellectual labour, ideological clashes and ultimately search for alternatives.

When studying ALBA, this critical approach is relevant to the research of its components, as opposed to the mainstream routes in IR, which develop a static theory of politics, within an

ahistorical conception of the state, an appeal to universal validity and the maintenance of social power relationships (Bieler & Morton, 2004). These characteristics make mainstream theories of regionalisation processes unable to recognise ALBA as the product of contextualised struggles between political ideas.

As discussed above, the fourth wave of regionalisation is characterised by a drift away from neoliberal regionalisation models. Mainstream theories approach the analysis of international institutions centred on states' agency, states being themselves the primary actor in IR analysis (Waltz, 1979). If ALBA were to be analysed through the same theoretical framework, the importance ALBA has given to direct participation and social movements, institutionalised through the Council of Social Movements, would be unrepresented.

Briceño-Ruiz's (2018) interpretation of the fourth wave as a post-neoliberal regionalism period is also relevant to analysing ALBA in the regional setting. According to this study, the open regionalism agenda is in the process of being replaced by the strengthening of the political, social, and productive dimensions of regional initiatives. However, this process in Latin America is also marked by the split of regionalism into three axes: The Southern Common Market (Mercosur), ALBA and the Pacific Alliance. Thus, as we had mentioned above, the fourth wave is marked by the creation of diverse economic and political regional models, numerous approaches to the role of regionalism in national strategies of economic development and diverse conceptions of the role of foreign policy (Ruiz, 2018).

Briceño-Ruiz (2018) further identifies political and economic cooperation models in the post-neoliberal regionalisation period, dividing them into economic and political integration agendas. Considering this, ALBA could be inserted in the economic sphere, within the "social regionalism" model, understanding integration as part of a mechanism to establish social standards, on the creation of institutions for the protection of social rights as well on the implementation of redistributive policies. In what concerns the political cooperation field, ALBA is identified by this author as a counter-hegemonic integration project, one that seeks to improve its position on the international balance of power.

Cusack (2019:14-16), on the other hand, notices that states involved in the post-neoliberal regionalism wave have an increased concern with autonomy in international relations. ALBA countries reinforce these characteristics while trying to pose a challenge to open regionalism through the revaluation of the state's role, as well as promoting solidarity-based projects, including civil society, into regional governance.

From this perspective, Cusack (2018, 2019) understands ALBA as a rival regional model to liberal internationalism. The main objective is to contain the further expansion of global capitalism from within a counter-hegemonic ideology. ALBA may be able to pose a challenge to open regionalism and thus insert itself within the fourth regional wave while also struggling with several contradictions that reveal shortcomings in its capacity to achieve the goal of truly representing a challenge to neoliberalism.

ALBA is composed of two main and symmetrical institutions, the Council of Presidents, containing within it other councils relative to high politics (the Political, Social and Economic Councils) and the Council of Social Movements (CMS). According to Cusack (2019:28-32), this latter is the most prominent innovation, as it serves as a means of direct civil society participation in the regional integration process and allows the participation of social movements outside the formal party system. Furthermore, this council aimed to serve the 21st century socialism agenda as an institutionalised resistance to global capitalism through solidarity and reciprocity, giving agency to social movements of both ALBA-member countries and non-member countries.

Most discussions on ALBA adopt multidisciplinary frameworks transcending the boundaries between IR, Economics, Political Science and Sociology (Absell, 2018:18-20). The best example of this multidisciplinary framework can be found in Thomas Muhr's (2013) *Counter-Globalization and Socialism in the 21st Century*. An interesting aspect of this book is its application of Marxist approaches to the study of regionalism in Latin America, offering a critical counterpoint to mainstream regionalisation theories (see also Cole 2011).

The term "counter-hegemony" has come to be used in Muhr's work to characterise ALBA. Muhr (2013) argues that ALBA constitutes a regional rival counter-hegemonic structure in relation to the global Washington consensus that led to previous forms of regionalism in Latin America. Thus, ALBA is identified in this literature as a challenge to hegemonic states and ideologies, with an agenda oriented towards the transformation of inter-state relations in the region.

ALBA is thus understood as the product of the radicalisation of Venezuela's foreign politics, as well as of the second phase of Venezuela's Bolivarian Revolution, the regionalisation of the 21st century socialism and the extension of counter-hegemonic movements with a national basis. However, Muhr (2011:167-168) stressed the rejection of the impression that Venezuela might be imposing ideology or a certain development model, favouring Venezuela's action as ALBA's pivot in terms of its institutional and material resources. Muhr (2011:167-168) also

noted Venezuela as the leader of the redefinition of other regional projects like the MERCOSUR, the Community of Nations, and UNASUR.

As mentioned above, Stephen Gill (2014:15-16) designed a framework to explain how a transnational class, in the improbability to impose a globalised hegemony, is able to impose supremacy over fragmented populations. Supremacy is instituted through disciplinary neoliberalism, which creates legal structures promoting a free market and positions powerful states in a dominant position to exercise pressure over smaller, weakened states. In Venezuela's Bolivarian Revolution, however, Muhr implies the possibility of Venezuela as the national base of a ruling counter-hegemonic supremacy. That would mean the exercise of dominance through the valorisation of "solidarity between the peoples, Latin American and Caribbean integration, leading a community of nations and a common foreign policy accompanied by a democratisation of the international society and the promotion of peaceful cooperation between states" (Muhr, 2011, 171).

According to Cox, altering a world order requires a laborious task of building a counter-hegemonic national historical bloc of social forces, which then needs to transnationalise (Cox, 1993:64-65). Thus, it is suggested here that Venezuela is the national base at the root of the counter-hegemonic historical bloc and that the regionalisation of the Bolivarian Revolution represents the attempt to transnationalise this national historical bloc through the exercise of supremacy in the form of solidarity for the Latin American and Caribbean people.

However, the question remains how was this counter-hegemonic historical bloc formed, and how did ALBA serve as the vessel for its transnationalisation?

In the previous chapter, it was discussed how Gramsci developed metaphors to illustrate strategies for revolutionary struggle, distinguishing the concepts of *war of movement* (a frontal attack to take over the state) and *war of position* (a longer-term strategy which slowly changes the configuration of social forces to ultimately prepare a frontal attack). Muhr (2011: 3-9) transported these concepts to explain ALBA as a "pluriscalar war of position".

According to Muhr (2011:84-85), the war of position was materialised in the Bolivarian Venezuela's construction of 21st century socialism, the ideological base of revolutionary potential (Muhr, 2011:84-85) and, the process of articulation and re-articulation in the struggle for hegemony (Mouffe, 1979). It seeks elements of cohesion within a hegemonic superstructure to develop a rival counter-hegemonic one. However, according to Muhr (2011:84-85), seeking to take over the state will not suffice because of the international context characterised by

neoliberal supremacy (in Gill's [2014] perception of the term), which still operates through inter, trans, and supranational disciplinary arrangements.

In this context, Muhr understands ALBA as an institution whose agency extends in space and scale, operating through inter and transnational processes across multiple spatial scales, from the local to the global (Muhr, 2012). Thus, by challenging the geographical basis of mainstream international relations theory, Muhr characterises ALBA as operating through a human-rights-based counter-vision of international law while pursuing emancipatory transformation through varied types of agency (from both state and non-state actors). While contemporary regionalist projects such as the European Union, NAFTA, Mercosur, among others, lack a social agenda, ALBA's social, humanitarian approach becomes a crucial integration factor (Muhr, 2008:155). This means that ALBA stands for the mobilisation of resources to restructure politics and democracy within states and in the international, regional, and global political spheres (Muhr, 2012).

The concept regionness is also important for Muhr when characterising ALBA as a counter-hegemonic project considering ALBA's regional space is defined by historical and cultural roots, as well their common struggles and interests (Muhr, 2008:237).

Muhr (2012) explains ALBA's pluri-scalar agency through a deep observation of Nicaragua's and El Salvador's revolutionary experiences. In these examples, Muhr visualises ALBA as the institutionalisation of a struggle that supports and encourages the organisation of non-state forces and actors at the local, national, international, and transnational scales towards the construction of the "transnational organised society", which represents an antagonist conception of civil society to that of liberal individualism and a capitalist market society. Organised society thus represents the popular, mass-based organisation and the collective exercise of popular power through councils and speaker-persons representing movements in the structuring of counter- or anti-capitalist social relations (Muhr, 2012).

Therefore, according to Muhr (2011:84-85), a counter-hegemonic movement, to be successful in the globalised world, needs to be "upscaled", which means that a revolutionary historical bloc would involve the formation of national, inter and transnational social forces through ALBA's superstructure (Muhr, 2011). Thus, the institutionalisation of the Council of Social Movements represents that the spatial scope of ALBA is being upscaled from the local and national to the regional and global levels (Muhr, 2012).

3.3. ALBA's Counter-Hegemonic Double-Turn

After analysing Thomas Muhr's understandings of ALBA, some questions start to arise. Was ALBA capable of consolidating a counter-hegemonic movement? What is the most appropriate neo-Gramscian approach to study ALBA?

An interesting complementary approach to ALBA as a vehicle for the transnationalisation of the counter-hegemonic movement associated with the Bolivarian Revolution is Martínez's (2013:63-77) analysis on the Council of Social Movements (CMS). In this context, Martínez introduces the notion of a "double-turn of counter-hegemony" within the CMS.

Within the first turn, this council's agency aligns with ALBA's agenda, acting within ALBA to promote the struggle against global neoliberal capitalism towards the foundation of new forms of solidarity, reciprocity, and sovereignty. In the second moment, Martínez argues that the movements in the region expressed dissatisfaction towards state-led integration favouring a collective borderless struggle through the emancipation of the *Articulación Continental* (AC) or Continental Articulation. Thus, the CMS is used as the means to further assert autonomy from the states themselves.

The CMS was created and recognised as a hierarchically equal space to the Council of Ministers', keeping a close connection between governments and the ALBA project. The CMS' goal was to expand the ALBA project and act as a mechanism of coordination between social movements and the ALBA project, exchanging information with the other Councils of ALBA, as well ALBA-member and non-member governments (Martínez, 2013:63-77). Meanwhile, the Continental Articulation was created to articulate the social movements and organisations around ALBA principles and initiatives. The AC thus embraced not only social movements from ALBA-member countries but also non-member countries and tried to deepen and consolidate an emancipatory political project characterised by popular integration.

What Martínez argues is that the AC was institutionalised as a reaction to social movements' concern for their autonomy in view of a growing predominance of the Council of Ministers' and of states' interests in ALBA's structures. The AC charter, approved by hundreds of social movements across Latin America in 2009, called for all Latin American social movements to "collectively build a Latin American integration social project which reconsiders the notion of development, from below, about the defence of nature's common goods, the development of an alternative civilisational model which assures the sovereignty of Latin America before imperialism and transnationals, assuming emancipatory dimensions, the multiple forms of

oppression resulted from capitalist exploration, colonial domination and patriarchy". (AC, 2009).

Thus, Martinez's (2013:63-77) argument is that, in the first moment, the CMS was working together with the states against neoliberal capitalism and was acting towards the transnationalisation of the national-based counter-hegemonic blocs. However, in a second moment, the CMS appears to exhibit growing scepticism with the growing predominance of state-leadership in the context of ALBA regional integration process, which resulted in the foundation of the AC. This institution is essentially a platform to coordinate every national chapter within the CMS, seeking emancipation from state-led integration. Thus, according to Martinez (2013:63-77), the creation of the AC represents the beginning of a second moment in the counter-hegemonic process, one in which the social movements represented in the CMS seek to reassert their influence over both ALBA and the overall regionalisation process in Latin America is growing opposition to the national-based counter-hegemonic historical blocs of which themselves are a part. Hence, an apparent break is in the process of occurring in the historical bloc associated with the Bolivarian Revolution as, increasingly, social movements contest the political elites that have hitherto led the process. This second moment is thus fundamentally characterised by the identification of the state itself, even when expressly led by a counter-hegemonic historical bloc, as another form of hegemony that constrains the emancipatory ambitions of social movements.

Would this imply that the transnationalisation of Venezuela's national historical bloc could be interpreted according to Robinson's neo-Gramscian approach? The AC could have become the means for the process of transnationalisation of class to take place by detaching the counter-hegemonic social forces from the state. In this case, transnational social classes, the true historical agents according to Robinson (2006), would enforce their relations and practices in other countries through a transnational state to reproduce counter-hegemonic social forces. However, as will be demonstrated in the following chapters, this institutional architecture is not fulfilled, and Stephen Gill's analysis will still be more relevant for the present study's analysis.

Martinez's approach exposes a fundamental fracture within the counter-hegemonic historical bloc associated with the Bolivarian Revolution, seeking to transnationalise itself via ALBA. This, however, highlights how Muhr's studies on ALBA tend to ignore this fracture and to conceive the counter-hegemonic bloc inaugurated with the Bolivarian Revolution as a monolithic whole, an occlusion that derives from a lack of ideological distancing on Muhr's

part, who is clearly committed to the ALBA project. That is, Muhr overvalues ALBA's positive components while purposefully underplaying ALBA's contradictions and shortcomings, even when analysed as a counter-hegemonic actor.

As this study stressed above, certain conceptions of the world are developed historically and organically over the premise: "The possibility of integral action belongs to human personality, conceded to every citizen" (Gramsci, 2019:66). Thus, conceptions of the world are historically developed by the accumulation of successive human experiences (Gramsci, 1971:195). What matters, though, is the criticism aimed at the ideological complexes by the representatives of the new historical phase. Thus, it is the continuous criticism of the new ideological complex directed at the contradictory elements of the old collective will that makes history progress.

This is the main criticism this study aims at Thomas Muhr's analysis of ALBA. The second counter-hegemonic turn of the CMS may be a consequence of the recognition, on the part of the social movements that are represented in the CMS, that the Latin American national states, even when expressly committed to ALBA's counter-hegemonic project, might assume positions that compromise that project itself. One major example of the contradiction ALBA faces is the source of the social missions funding, which comes directly from oil and energy resources exploration. This not only causes an immense impact on the environment, but it also destroys indigenous communities and clashes against ALBA's *buen vivir* development strategy. This position has led to the creation of the AC as a new historical phase in the counter-hegemonic movement in Latin America that seeks to depart from its state-based origins.

Alas, with the end of the Pink Tide, as left-wing governments were voted out or forcibly removed from power, the diversity of international institutions types could be waning as ALBA is losing centrality. The region might be witnessing a return to the hegemonic, open regionalism agenda, which is marked by the foundation of the Pacific Alliance in 2011. The fourth wave of regionalism in Latin America, when US hegemony was being contested, might be coming to an end, as no regional counter-hegemony was capable of fully undermining the neoliberal hegemonic consensus in the region.

To analyse ALBA's achievements as a counter-hegemonic movement, it is thus important to trace its evolution in ways that highlight its internal contradictions, namely through the lenses of the tensions between states and social movements that were part of the ALBA project. This means moving beyond the neo-Gramscian approach provided by Thomas Muhr by complementing it with Martínez's insights on the growing tensions between social movements, Venezuela's national elites and the international sphere. The next most important task is thus

to build an appropriate methodology to analyse the double-movement in ALBA's counter-hegemonic project. Critical Discourse Analysis is an important tool in this context.

3.4. Methodology Section: Critical Discourse Analysis

According to Fairclough (2001:14-35), linguistic phenomena are a product of social events and structures. Thus, whenever people interact (through speech, listening, writing, or reading), they do it in a social way, determined socially, with social effects.

Thomas Muhr's analysis of ALBA through neo-Gramscian lenses stated, through an analysis of Nicaragua and Venezuela's revolutionary experience, that the socialism of the 21st century is the result of an upscaled, pluriscalar war of position. However, the present study suggests that Muhr (2012, 2013) did not consider how Gramsci stressed the importance of a never-ending criticism of common sense in the constitution of counter-hegemonic movements and thus lost sight of how ALBA was characterised by internal contradictions that question its success in constituting itself as the platform for the transnationalisation of a successful counter-hegemonic movement in Latin America. These tensions are expressed with particular acuity by what above is characterised as the second moment in the counter-hegemonic movement, characterised by the CMS's creation of AC and their expressed criticism of the state-led ALBA regionalisation process. Thus, the present study aims to highlight the importance of civil society's criticism of ALBA as a way to access the latter as a counter-hegemonic project. Towards this end, the present section discusses the methodological approach that informs this study. This task is to be fulfilled through an approach of Critical Discourse Analysis (CDA).

CDA emerged from critical linguistics as a socio-politically conscious way of investigating language. It is an approach used to study text and talk (Dijk, 1995). Among other aims, CDA attempts to uncover what is implicit and how dominance or ideology are discursively enacted. Thus, CDA is an approach focused on discursive ways of manipulation, legitimisation, naturalisation, and manufacturing of consent within the interest of power. This demonstrates that CDA has the practical objective of increasing the consciousness of the close relations between language and power and how it contributes to the manipulation of people (Fairclough, 2001:1-13). Therefore, the critical aspect of CDA rests upon solidarity with dominated groups towards the development of counter-ideologies for resistance purposes against power elites who abuse their power (Dijk, 1995).

It is important to stress that CDA brings a critical social analysis into language studies. This means that CDA contributes to the focus on discourse and its relations with other social

elements such as ideology, institutions, or social identities (Fairclough, 2001:1-13). CDA emerged in response to the apparent triumph of capitalism in the 1990s, and the consequent withdrawals of intellectuals from the left, who identified with resistance and an emancipatory academic agenda with the consequent accommodation of the prevailing social order and the embracing of the “End of History” (Robinson, 2005:15-18). Fairclough (1995), one of the most prominent authors of CDA, stated in the decade of 1990s that “critical theory and critical analysis were under attack (...) and many analysts [were] becoming hesitant in their use of basic theoretical concepts such as power, ideology and class” (Fairclough, 1995:15). However, the contradictions of capitalist society have not diminished the role of either critical theory or discursive practice. Therefore, CDA emphasises that all collective life, including academic engagement, is part of social and political life, on the selection of theory, conceptualisation, and data selection.

There are some similarities between Gramsci’s theoretical framework and CDA, which makes Gramsci’s concepts particularly relevant within the CDA approach.

The relationship between the ideational and material spheres of social production, consequently avoiding unhelpful dichotomies, is in part what makes Gramsci’s perspective so compatible with CDA (Donoghue, 2018). CDA’s epistemology, Donoghue argues (2018), is also centred on this relationship. Meanings are formed through peoples’ understandings, and the creation of social identities are formed by the relation between social processes and forces of production. This ultimately reflects the material conditions and social relations within a given historical period. According to Donoghue (2018), this process marks the emergence of dominant discourses and shapes the frame of peoples’ understandings of social relations. CDA has the role of approaching these dominant discourses and disclosing how they are manufactured, consented to, and legitimised.

Another notion that ties Gramscian perspectives to CDA is the concept of hegemony. As discussed in the previous chapter, the concept of hegemony is composed of two elements, consent, and coercion. From a CDA approach, discourse materialises a contribution for the emergence and maintenance of hegemonic relations, which, in part, occurs through the naturalisation of common sense, a particular worldview that takes “countless multitudes” of meanings and makes them unquestioned, thus contributing to sustaining existing power relations via consent (Buttigieg, 1995).

According to Fairclough (1995:92-96), there is a dual relationship between discourse and hegemony. First, the struggle for hegemonic practice progressively takes form through

discourse in spoken and written interaction. This process involves numerous domains of civil society, which consequently naturalises relations, ideologies, materialised in knowledge and beliefs, opinions, and ideological presuppositions, becoming naturalised and described by the author, as “commonsensical” (Fairclough, 1995:92-96).

A counter-hegemonic agenda would have to struggle against hegemonic ideology in the process of denaturalisation of these existing conventions to replace them with others.

Second, the relation between discourse and hegemony focuses on questioning how wide is hegemony’s cultural sphere. Cultural hegemony thus can express itself at the local, national, or indeed on a transnational scale. This relation focuses on the unstable equilibrium between hegemonic and counter-hegemonic discursive practices (Fairclough, 1995:75-82).

These two aspects of hegemony serve to simply state that it is in discursive practice that hegemonic structuring of discourse is reproduced, challenged, and transformed (Fairclough, 1995:92-96). Thus, in conclusion, in the CDA approach, the only place for struggle is among the process of naturalisation and restructuring of commonsensical meanings.

To clarify, this study understands ideology, according to Fairclough (2001), as institutional practices which often embody assumptions, directly (or indirectly) legitimising existing power relations. Common sense serves dominant powers to sustain unequal relations of power (Fairclough, 2001:64-90). In a way, there is a struggle between the stabilised configuration of discursive practices, which act to constrain creativity in discourse (Fairclough, 1995). This process is understood as the result of the naturalisation of common sense.

Thus, common sense is questioned by the CDA approach and the neo-Gramscian school of thought, which seek to disclose how the internalisation and normalisation of speech patterns become unquestioned within particular world views (Donoghue, 2018). Therefore, while common sense can be portrayed as the site for struggle, within an amalgam of social practices and forms of speech, hegemony, according to CDA, becomes the embodiment of the internalisation of common sense (Stoddart, 2014), that is, mundane perceptions and activities reproduced within civil society’s institutions such as the church, family, and educational institutions (Gramsci, 1971).

Thus, the ultimate object of Fairclough’s CDA is to disclose the processes through which common sense is formed, naturalised, and interiorised and, concomitantly, to create an agenda for emancipatory action through the formulation of strategic proposals for the development of

counter-hegemonic discourses that denaturalise common sense and open up the possibility of its reconstitution along emancipatory lines.

According to Fairclough (2011:9-20), as an approach, CDA might focus on two different frames of analysis. It may focus on structures, and therefore study the intermediate levels that structure social practices, or it may analyse the discursive strategies via which social agents constitute and manifest themselves. In both approaches, there is a central concern with the struggle for social change (Fairclough, 2011:9-20). These two frames of analysis orientate the research in the following chapters, as these are based on an analysis of the discourses that informed both the constitution of ALBA as a counter-hegemonic project and the way social movements assessed the ALBA project, at first supporting it, but eventually coming to question its increasingly state-centred character.

The next chapter starts with a deep contextualisation of Latin America's historical struggle against neoliberal capitalism's global hegemony, which resulted in the emergence of the New Left and the Pink Tide governments during the 20th century. This context will prioritise the events from the 1970s-decade economic crisis in Venezuela's national context, which ultimately triggered the Bolivarian Revolution and the international institution of this study's interest, the Bolivarian Alliance. Within this contextualisation, there are some speeches which this study aims to discuss and approach from a CDA perspective with the fundamental purpose of understanding ALBA's authors' intentions, as well as the expressed motivations of the national leaders who enthusiastically followed the Bolivarian project. Particular emphasis will also be placed on the analysis of social movements understanding of ALBA and its role in the overall counter-hegemonic movement in Latin America. Namely, this study seeks to stress the counter-hegemonic double-turn, which ultimately manifested itself through the social movements' interactions with national elites and the international dimension. It seeks to discursively trace how one of the consequences of the Bolivarian Revolution was the recognition, on the part of social movements, that although governments might have changed and supported civil society, there must be a continuous struggle for radical transformation in political power and an ongoing critique of the developing common sense. In *Venezuela Speaks* (2010), a book with an ensemble of interviews of social movements leaders, there is clear evidence of a "dual fight", of a revolution within a revolution, that gains expression as social movements simultaneously supports governments connected with the Bolivarian Revolution, but also pressures them to work for their communities and contests the tendency for ALBA to become a state-led process. Thus, it is this dual fight that is to be analysed through CDA.

As stated above, Hugo Chávez's role in the construction of the Bolivarian Revolution and the ideas that emerged from then is unquestionable. In an interview to Rádio e Televisão de Portugal (RTP2, 2008), conversing to Mário Soares, the first prime-minister elected after Portugal's Carnation Revolution, Hugo Chávez made an interesting statement about the Bolivarian Socialism. Asked by Soares what the Bolivarian socialism was and the meaning behind it, Chávez cited, summoning Mariatégui's words, "socialism cannot be of calque or copy. It must be a heroic creation". Chávez added that socialism is like the rainbow; it can exist in the spectre of many colours, which needs to be invented every single day. Chávez additionally declared that he was forged within Simón Bolívar's ideals which concern the integration of Latin America, as well Bolívar's utilitarian democratic vision. "*O inventamos, o erramos*" ("Either we invent, or we err"), a motto by Rodríguez, one of Venezuela's forefather's which became the main idea behind the Bolivarian socialism with Chávez as its intellectual author.

This study's objective is to listen closely to these messages and note that, although Chávez became a centrepiece in the Bolivarian project, the Chávez regime cannot be the focus when analysing ALBA's agency, much less the progression of civil society's action among ALBA countries. This was made clear by Iraida Morocoima, a spokesperson for the *Campamentos de Pioneros*, the Settlers' Movement struggling against capital in urban areas (Vaz, 2021):

"The struggle against the opposition so that they do not alter our goals, and the struggle against the government bureaucrats that support large financial capital who continue to give these lands to the large construction companies. That is why we say this is a process of revolution within the revolution." (Morocoima, 2010:41).

Morocoima (2010) further adds that academics and media should not be so focused on Chávez and rather worry and support the people instead. Chávez represents the door for the struggles that movements like Morocoima's, but the latter's voices should not be silenced in favour of only hearing the former's. The development of counter-hegemonic movements is characterised by permanent power struggles, not only between counter-hegemony and hegemony, but within the counter-hegemonic movement itself, for its definition, goals, and methods. It is these tensions that this study is interested in and seeks to understand, a struggle within and beyond ALBA, focused on the people.

Chapter 4: The Bolivarian Revolution

4.1. Introduction

In the methodology section of the present study, the main notions of Critical Discourse Analysis (CDA) were introduced. It is an approach to discourse which attempts to reveal the implicit relations and abuses of power by dominant groups and institutions through discourse enacted ideologies (Dijk, 1995). The close relationship that the CDA approach has with the neo-Gramscian school of thought orientates it towards disclosing the processes of normalisation of speech patterns which ultimately become unquestioned within a particular world view, and thus to question what is understood as “common sense”. From a neo-Gramscian perspective, common sense is understood as the embodiment of hegemony, implying both the coercive and consensual halves of hegemonic rule. CDA’s ultimate objective is to disclose the naturalisation processes of common sense and provide openings for the development of an emancipatory agenda characterised by counter-hegemonic discourses that re-write common sense into emancipatory lines.

The previous chapter focused on framing ALBA within the Neo-Gramscian framework and discussing ALBA as the institutional means for the transnationalisation of a counter-hegemonic emancipatory agenda in Latin America against the neoliberal-oriented Washington Consensus. In this chapter, the Venezuela Bolivarian Revolution is also analysed within a neo-Gramscian framework, through which it can be characterised as having two distinct, but overlapping, phases: The first consisted in the national process of the Bolivarian Revolution since Hugo Chávez’s first election until the US-backed coup attempt in 2002. The second moment consisted of Chávez’s turn to foreign policy and the attempt to transnationalise the Bolivarian historical bloc of social forces. Concomitantly, the present chapter analyses through the CDA approach the discourses surrounding the Bolivarian revolution.

The chapter is divided into three sections: The first discusses the construction of the Bolivarian ideal, which Hugo Chávez, its ideological author and Venezuela’s leader, promoted. This section aims to present the historical characters, like *Símon Bolívar* and *José Martí*, revived through the 21st century socialism within the Bolivarian Revolution context. Furthermore, this section discusses the promulgation and approval of the Bolivarian Constitution and the model of participatory democracy it sought to promote. One that officially seeks to give civil society and social movements a crucial role, establishing accountability methods between the central government and the people. Many Venezuelan social movements understood the Bolivarian

Constitution as an important tool to achieve their ends in the sectors of education, housing, health, among others (Cusack, 2019:53-92).

The second section of the chapter is dedicated to Chávez's foreign policy turn of the Bolivarian Revolution, in the context of which he sought to transnationalise the Revolution via the quest for an alternative model of Latin American regional integration in the context of which ALBA emerged as a protest to *Área de Libre Comercio de las Américas* (ALCA; or Free Trade Association Agreement [FTAA]). Thus, this second section considers the historical context in which Venezuela's "new strategic map" was developed in the form of Latin Americanism's integration strategies, antagonistic to the Pan-Americanism model in which the ALCA is built. The third and last section of this chapter describes what was considered by the Pink Tide leaders as the first diplomatic victory of this transnationalisation strategy through the defeat of the ALCA project at the Summit of the Americas in Mar del Plata in 2005.

4.2. The Heroes of the Bolivarian Revolution

In August 1805, after visiting Paris, Simón Bolívar and Simón Rodríguez travelled to Rome and climbed the slopes of the Monte Sacro, near an ancient spring and devoted a romantic oath to the people of Latin American and their independence struggle. Although embellished and polished by Rodríguez after Bolívar's death, their words remain ingrained within Venezuelan memory, learnt by children at public schools, and performed during military service:

"I swear before you, and I swear before the God of my fathers, that I will not allow my arm to relax, nor my soul to rest until I have broken the chains that oppress us (...)." (Gott, 2011:118).

When Chávez was elected for the third time in 2007, as he was resting his left hand on the Constitution of Venezuela's 5th Republic taking his Presidential Oath, his first words recalled Bolívar's:

I swear to my people, and I swear to my motherland, that I will not allow my arm to relax, nor my soul to rest, for the Venezuelan socialism, (...), I swear for all hopes, (...) that I will enforce by the supreme mandates of this Constitution (...). Motherland, Socialism, or death! I swear it! (AP Archive, 2015).

In this statement, not only did Chávez summon the words of Simón Bolívar, but he also replicated the slogan inspired by both Fidel Castro's "Motherland or death" and Che Guevara's "Socialism or death" (Aponte-Moreno & Lattig, 2012) speeches. This demonstrates the complicity between Chávez and the Cuban leaders. This speech is but an example of how

Chávez often recalls the heroic characters of the Bolivarian Revolution but also recognises Cuba as the “stronghold of Latin America’s dignity” (TeleSUR English, 2014).

Chávez referred to Cuba as such in 1994, on December the 14th, in Havana University, where he was invited to and greeted by Fidel like a visiting head of state, after being released from prison following a failed coup d’état in 1992 against President Carlos Andrés Pérez. Fidel Castro became almost an ideological father figure to the Bolivarian Revolution and to Chávez himself (Wilpert, 2007:162-164).

Both Chávez and Fidel share some rhetoric strategies in their speeches. The first is the life-long commitment to revolution in expressions of grandeur, both referring to historical figures to legitimise their projects and, the second is, as military leaders, their frequent use of military metaphors (Aponte-Moreno & Lattig, 2012). Chávez gathers these characteristics in a single passage during his speech in Havana, adding a spiritual relationship to Cuba. Chávez, mentioning that although he had not been in Cuba physically, he and the Bolivarian army had visited that country in dreams, devoting their lives to the revolutionary project. In a very emotional speech, Chávez demonstrated gratitude to Fidel for the invitation, and the civil greeting at the airport of José Martí, and to the people surrounding them while adding that, although he still did not deserve such an honour, he hoped to be worthy of it one day (TeleSUR English, 2014).

This passage is a great example of the Bolivarian discourse, fulfilling the three rhetoric strategies engaged by Hugo Chávez and Fidel Castro. The recalling of the name of the Cuban International airport of José Martí symbolises the historical struggle for emancipation, the life-long commitment to the revolutionary cause within the hope of deserving Fidel’s honour and invitation, and, finally, the military expressions carried within the connection to Cuba from dreams. Chávez, in a single passage, builds the connections of the Bolivarian ideal to their future allies to fulfil the revolution in Venezuela.

What topics were engaged in Havana University? Why is this speech relevant?

Fidel invited Chávez to Cuba shortly after the revolutionary leader was released from prison. Chávez arrived at the José Martí airport on December 11, 1994, coinciding with the opening of the Summit of the Americas hosted in Miami, United States of America. The Summit gathered leaders from all over the American continent, both the North and South, excluding Cuba and the Cuban leader Fidel Castro, due to the embargo imposed in the aftermath of the Cuban missile crisis in 1963.

According to the Summit's agenda, it was aimed at the American continent towards progress on numerous fronts. The tasks for the event gathered around the enhancement of democracy, the promotion of development, furthering economic integration, and free trade. Ultimately, it expressed its aim as the improvement of the lives of the people of the American continent in an environmentally sustainable framework (SoA, 1994). The Summit represented the first instance of hemispheric coordination, in other words, the first attempt to agree on economic integration at a continental scale. Specifically, it marked the beginning of the conversations about the expansion of the free trade area beyond the recently instituted North America Free Trade Agreement (NAFTA). This continental free trade area agreed to in 1994, drafted in 1998, would have been in force by 2005 in the form of the Free Trade Agreement of the Americas (FTAA or ALCA in Spanish) if it were not for the events that took place at the Summit of the Americas in Mar del Plata 2005.

Fidel Castro opened his speech by referring to the ongoing Summit in Miami. The plan of action of the Summit concerned the whole continent; however, Castro stressed that only ninety miles from Miami, in Havana University, the encounter between Venezuela and Cuba represented a Summit of Bolivarian ideas. The Cuba Summit concerned the Latin American continent, including all the countries in Southern and Caribbean America. Castro summoned Bolívar and José Martí, similarly to Chávez, historical figures with revolutionary ideas in expressions of grandeur, and asked the audience if these characters would gladly attend the Miami Summit. Answering directly to the future ALCA area of interest, from Alaska to Patagonia (FTAA, 1998), Castro criticised the USA for excluding those who strayed away from the "line" defined by the Washington Consensus ideals of neoliberal capitalism and liberal representative democracy, from which Cuba diverged.

Meanwhile, in the first summit of the Americas in Miami, Bill Clinton proclaimed the dawn of a new partnership, prioritising the people of America, projecting action towards the future. President Bill Clinton concluded this speech appealing to the memory of the "Spirit of Miami" (clintonlibrary42, 2013). This aimed to represent hope through adversity and the challenges the resolutions of the Summit would come across. In the speeches closing the Summit, "hope" was specially summoned by Haiti's President, Jean-Bertrand Aristide. The President of Haiti opened his speech with words of gratitude and happiness to both the resistance spirit of the first black Republic but also to the International Community, especially to the President of the United States for bringing hope to the Haitian people. In Aristides speech, "hope" represents the United Nation's Resolution 940, which deploys into Haiti the "Mission United Nations Mission in Haiti" (UNMIH) (UN, 2000). The mission intended to secure a safe environment

for the international personnel and key installations, the professionalisation of Haitian armed forces and, most importantly, to assist the legitimate constitutional authorities in establishing free legislative elections. Towards closure, Bill Clinton's speech marking the end of the first Summit of the Americas saluted Aristides' hope and called to the memory of the "Spirit of Miami" (clintonlibrary42, 2013).

However, Bill Clinton's slogan for the Summit, "Spirit of Miami", did not pass unnoticed by Fidel Castro. In the Summit of the Americas the situation in Cuba was not only condemned, the leaders proposed the application of the Haitian formula. Fidel Castro mentioning this proposal smiled, the camera shot to Hugo Chávez and caught the same mocking answer. Fidel answered that the Summit happening in Miami was not a "Summit for Rebels"; therefore, Cuba was excluded. However, even if the world were to launch their mercenaries against Cuba, the Revolution would resist any imposition from the United States of America (TeleSUR English, 2014).

Thus, what Fidel was aiming to demonstrate was that Cuba, being one of the excluded states from the North American agenda, the "villain in the movie" (TeleSUR English, 2014), was excluded because there was no place for countries with different, alternative economic or political systems. Those who strayed from the broadly naturalised and "commonsensical" models would be set aside and be forcibly imposed the patterns determined by the powerful states, namely the economic system of neoliberal capitalism allied to the political system of liberal representative democracy. Ultimately, the "Summit of Rebels" where the Cuban and Venezuelan leaders were present symbolised the alternative to the "spirit of Miami", where there would be no place for them, the socialist leaders, nor the Bolivarian ideals and the people who believed in them. Thus, the Summit of Rebels was expressly characterised as a counter-hegemonic moment to the Summit of the Americas and the Spirit of Miami of 1994.

In our analysis, this speech marks the beginning of a counter-hegemonic discourse, a discourse enacted as an alternative to the Washington Consensus within the construction of the Venezuelan Bolivarian ideal with a revolutionary political project legitimised by Fidel Castro. The Cuban leader, embodying the spirit of revolution and the guerrillas in Latin America, said it was his task to follow Chávez as the example of a democratic revolution with the people (Aponte-Moreno & Lattig, 2012). This demonstrates that not only did Chávez embrace Fidel as his mentor, Fidel himself argued to have lessons to learn from Chávez. The Summit of Rebels thus marked the edification of the bridge between Revolutionary Cuba, and the soon-to-be revolutionary Venezuela legitimised by the former, materialised by the latter.

What is Simón Bolívar's legacy, and how is he transported into Chávez's Bolivarian ideal?

Simón Bolívar lives on in the Latin American legacy as the revolutionary liberator of Venezuelan and other South American people, mentioned in history and remembered for political purposes. However, Chávez appropriated this historical figure as never before, calquing Bolívar in national symbols and public spaces. The Republic of Venezuela became, shortly after Chávez's election in 1999, the Bolivarian Republic of Venezuela, Bolivarian Universities were erected, the Bolivarian Government was referred to in official documents, the Bolivarian army was incorporated into the political system (Gott, 2011:134-149), between other examples, to connect Chávez's political project with the legacy of Simón Bolívar himself (Aponte-Moreno & Lattig, 2012).

Another Bolivarian legacy is the enemies of the past that Chávez invokes to the present. The revolution is materialised as the continuation of Bolívar's struggles against imperialism, bringing the anti-imperialist rhetoric to the present through anti-north-Americanism, the oppressor of the peoples of the present moment (Aponte-Moreno & Lattig, 2012).

The Summit at the Havana University ("Summit of Rebels") took place shortly after Hugo Chávez was released from prison, the culprit of a failed coup d'état against the Carlos André Pérez's government in February 1992. This was the moment Coronel Chávez became a national figure, the "face" of the revolution. According to Gott's (2011:63-70) report on February 4th, 1992, the main plan was seizing the opportunity president Pérez was out of the country and, upon his arrival, scheduled that same day, detain him at the airport. On the next day (February 5th), Coronel Chávez, the main conspirator of the Bolivarian Revolutionary Movement, mobilised in the parachute regiment in Maracay. But, realising the mission had failed, and there was no chance of a successful countrywide revolution, he asked to speak on television to avoid further bloodshed (Gott, 2011:63-70).

The broadcast, directed at the parachute regiment in Aragua and the tank brigade in Valencia, lasted for a single minute; however, a moment of personal disaster would convert Coronel Chávez to Venezuela's potential saviour:

(...) Comrades: unfortunately, for the moment, the objectives that we had set ourselves have not been achieved in the capital. (...) [L]isten to comandante Chávez who is sending you this message (...). Lay down your arms, the objectives that we set ourselves at a national level are not within our grasp. Comrades, (...) I am grateful for your loyalty, (...) I alone shoulder the responsibility for this Bolivarian military uprising. Thank you (teleSUR tv, 2014).

Two phrases within this short broadcast made a particular impact on the Venezuelan people. The first one was the impact Chávez's apology brought into a nation that had suffered in the recent years numerous economic and political failures – the devaluation of the currency, the bank collapses, the corruption trials, the declining economy, the violence during *Caracazo* – and received no apology from ruling politicians that never assumed responsibility for something that had gone wrong. The other impact engraved on the Venezuelan people were the words “*por ahora*” (for the moment) symbolising hope, the promise of Chávez and the Bolivarian Revolution's return, the continuation of the Bolivarian struggle (Gott, 2011:63-70). Comandante Chávez was imprisoned for two years until Rafael Caldera, the President elected in 1994, conceded the amnesty after being elected. Chávez, in the first conference after his release, when asked what he was going to do, responded: “I am going to get into power” (Gott, 2011:149).

According to Anthea McCarthy-Jones (2015), the moment which marks the beginning of the Bolivarian Revolution is when Hugo Chávez was first elected in 1999. McCarthy-Jones (2015:47-66) divides these periods to better understand the importance of Chávez's leadership in the development of the Bolivarian Revolution in McCarthy's study. Chávez's policy, in this first phase of the revolution, was inclined principally towards domestic policy, particularly reflected in the primary need to dissolve, and replace the National Congress and elect a Constitutional Assembly to change the previous Constitution. However, the present study marks the beginning of the Bolivarian Revolution in the first struggle towards the implementation of Bolivarian ideals and policies that influenced the processes of Latin American regional integration in the twenty-first century. This is the outcome of the 1992 coup attempt and the political manoeuvres Chávez faced to gain popularity until he was elected Venezuela's President in 1999.

The period between Chávez's release from prison in 1994 and the year the Coronel was elected President is crucial to understand Chávez as a political leader. The question arises, how did Chávez become a political, democratically elected leader?

According to Gott (2015: 272), Chávez's attractiveness is due to something which differentiates Chávez from other political leaders like Fidel Castro: his unsuccessful attempt to seize power by force in 1992, which was consequently ratified by grateful people at elections. When Chávez was released from prison in 1994, he stated that he was going to go into power. At this point, he had two options to choose from. He could attempt another coup which was likely to be successful this time around because, according to a Chávez's speech held in Havana

in 2004, “more than 80 per cent of the Venezuelan military who have a favourable opinion of us – in the army, navy, and the air force, and the National Guard” (Gott,2011:281). It is also productive to say that Chávez did not reject this path to take power through a second attempt to coup the incumbent government, stating that “Venezuela does not reject armed struggle” (Gott, 2011:281); however, Chávez had in mind a structured and strategic plan to revolutionise Venezuela politically and economically.

The Bolivarian leader preferred to rise to power without any bloodshed. However, Chávez’s strategy went further than that; he wanted to make sure the revolution was successful:

“[Our] plan is to build alliances with the social and political forces, because, in 1998, we could launch a vigorous campaign with considerable electoral strength, with the support of the people and broad sectors in the armed forces and take power in this traditional way” (Gott, 2011:283).

In 1994 Chávez was aware of the Venezuelan political and electoral system being corrupt and too weighted down against newcomers. Therefore, his initial focus for a political agenda was centred on the dissolving of the National Congress, as well as the need to elect a Constitutional Assembly. Six months before the election in 1998, Chávez first aimed to build the Bolivarian Revolutionary Movement into a structured political organisation. Joining together both the military and civilian support, Chávez assured that the present election would represent two antagonistic poles: “the patriotic pole led by the Bolivarian Movement, and the pole of national destruction led by the old political elites”. This argument was constant in Chávez’s 1998 campaign, a complete scission from the old system to turn Venezuela anew into the Bolivarian Venezuela. Thus, the *Movimiento Quinta República* (Fifth Republic Movement or MVR) was founded to represent a complete break from the system Chávez was challenging and to organise a new political grouping into a campaigning organisation.

Chávez’s movement would seek to recover ideas of the past, founded on the ideas of Bolívar:

Its mission is to secure the national community's well-being, satisfy the individual and collective aspirations of the Venezuelan people, and guarantee a state of optimum prosperity for the fatherland (Gott, 2015:136).

According to Gott (2015:134), Chávez’s political agenda’s support was growing, and conversations with the political parties *La Causa R* (Radical Cause) and Movement for Socialism (MAS) were prospering, ultimately joining forces with Chávez to form the *Pólo Patriótico* (Patriotic Pole). Their main contribution was to infuse within the MVR particular and differing left ideologies.

On December 6th, 1998, Hugo Chávez was elected President, and the MVR overwhelmed the constituent parties of the *Polo Patriótico*. Thus, Chávez became the dominant personality in Venezuela. In four short years, Coronel Chávez was released from prison and headed directly to the Presidential Palace in Caracas. In his speech as President, Chávez saluted the people of Venezuela, stating:

The Venezuelan people are kneading the clay of the Liberators of this continent and demonstrating [their] immensity. (...) Chávez is a national sentiment; Chávez is a collective project. (...) Today, let us become, united, the new protagonists of this New History of Venezuela (Luigino Bracci Roa, 2013).

The intention to write a new Constitution for Venezuela was immediately announced by Chávez in his first speech when elected President in 1999. Thus, President Chávez declared the immediate signature of a decree for a national referendum for the people to decide whether elections should be held towards the establishment of a Constitutional Assembly.

The final document was submitted to a referendum on November 12th, 1999, approved popularly by 71 per cent voting “Yes”. According to Cusack (2019), the new Republic showed several distinguishing characteristics that would become the centre of the Venezuelan political economy. The promotion of national and Latin American & Caribbean autonomy became crucial and the pursuit of endogenous development while achieving legitimacy in the eyes of newly enfranchised people (Cusack, 2019). The latter refers especially to the indigenous people (RBV, 1999:219).

The indigenous population constitutes 2.7 per cent of the country’s population, according to the Venezuelan census in 2011. According to Angosto-Ferrández (2015:177-190), despite being a fraction of the Venezuelan population, it is still central to the construction of the nation’s image. Chapter VIII of the Bolivarian Constitution became a banner of political change with the fundamental acknowledgement of the historical struggles of the indigenous peoples, “as a consequence of these conditions of vulnerability, the indigenous rights were recognised internationally as specific and original rights”. This means the Constitution protects the indigenous people through a deep change of political perspective and “directs the Venezuelan State to acknowledge its multi-ethnic, pluricultural and multilanguage character” (RBV, 1999:212-215).

This translated into indigenous political participation from electoral enfranchisement to extra-institutional and bureaucratic representation. Ultimately the constitutional rights added to the stimulated participation of the Bolivarian Constitutions’ newly founded importance over civil society, organisations, and communities functioning as mediators between the state and the

people, including the indigenous people, were able to be elected and legislate in a self-interest way (Angosto-Ferrández, 2016: 125-130).

Furthermore, the 5th Venezuelan Republic Constitution marked a new bottom-up built legitimacy, a “protagonistic” role to civil society (Cusack, 2019:59). According to Cusack (2019:59), the 1999 Bolivarian Constitution had three major concerns: First, the promotion of Latin American and Caribbean autonomy, second, the pursuit of internal development and, finally, the achievement of legitimacy towards those newly enfranchised populations, such as the indigenous. “Participatory Democracy refers to the employment of mass participation in political decision-making to complement or even replace traditional institutions, as well lobbying institutions associated with representative democracy (Hawkins, 2010). The 1999 Constitution concerns about the level of opportunity for participation, as well the quality of participation. That is, Article 62 (RBV, 1999:182) states that “the participation of the people in the creation and execution, and control of public affairs is the required means to achieve the protagonism that guarantees their complete development, both as individuals and as a collective”. This would allow participation through traditional methods, such as, “elections to public office; the right to referendum; the consultation of public opinion; the recall of public officials; the legislative, constitutional, and constituent initiatives; the town hall meetings; and the citizen assembly” (RBV, 1999:182-189). However, according to Hawkins (2010), the Constitution also guarantees peoples participation in less traditional arenas such as “government offices open to the public; self-management; co-management; all forms of cooperatives, and community businesses” (RBV, 1999:185).

The Constitution of the Bolivarian Republic of Venezuela would drive the idea of a “participatory democracy”. According to Macpherson (1977:93-115), there are two main prerequisites for the emergence of a participatory democratic model. The first one concerns a change in people’s consciousness (Macpherson, 1977:93-115). To this, Macpherson refers to a change from the individualist consumer identity to one of the developers of their own capacities, which, together with a collective spirit, generates a sense of community (Muhr, 2012). The second pre-requisite concerns a reduction in social and economic inequality since the non-participatory democratic model requires inequality to hold society together (Macpherson, 1977:93-115).

This idea is given in Article 62 (RBV, 1999:182): “All citizens have the right to participate freely in public matters (...).” The institutionalisation of the participatory democratic model established *misiones* (missions) in the social, political, economic, and cultural spheres (Muhr, 2008b), which ultimately promoted grand missions for large-scale social projects, including

the development of citizen participation in local government planning and decision making. Ultimately, the new Bolivarian Constitution would give a “protagonistic” role to social movements; a tool social movements have ever since sought to use both within Venezuela and in the context of ALBA.

The newly gained role of social movements had its origin in the massification of electoral politics, which translated into the dynamisation of electoral procedures through the amplification of citizenship services (many communities were not registered in suffrage until then) and automation of the electoral system. Chávez’s vigorous electoral culture and the regular popular consultations were understood as the appropriate electoral infrastructure (Vargas, 2020:185-208). The 2012 PDN (*Plan de Desarrollo de la Nación*) also campaigned towards a culture of popular mobilisation. The PDN is a program for the planification of contributions to electoral campaigns at the local and regional levels, organising debates between the candidates and seeking the inclusion of the peoples during the electoral processes. The organisation and expansion of Communal Councils (*Consejos Comunales*) also became an important index of popular mobilisation. Communal Councils are a new type of neighbourhood association (Hawkins, 2010). Each council is constituted up to four hundred families who then meet in a Citizens Assembly. Because the Communal Councils are not purely territorial, they are able to overlap within the same community. The multiplication of communal spaces was understood as the materialisation of the participatory democracy project spreading across rural and urban areas but in inter-communal spaces (Vargas, 2020:185-208). According to Hernán Vargas (2020), the Bolivarian Constitution symbolised the refoundation of Venezuelan politics under the participatory democratic model. Its promoters understood it as the first impulse of a national project in which sovereignty was placed in the people’s hands who exercise it directly through mechanisms established by the new Constitution. It sought the consolidation of national independence from foreign potencies through the construction of “socialism of the 21st century” and a deep transformation of Venezuela’s economic and political system. This political project aimed at the transnationalisation of the Bolivarian national project having in view creating a multipolar world. An important feature of the wider project was also protecting the environment and preserving life on planet Earth (Vargas, 2020:185-208).

According to McCarthy Jones (2015:47-66), the first years of Venezuela’s fifth Republic and its push towards a participatory democracy model were also marked by the approval of laws that would greatly enhance the authority of President Hugo Chávez, conceding the ability to govern without interference from parliamentary checks and balances. These laws could be

traced in their origin to the Venezuelan Constitution of 1961, the so-called *Ley Especial*, which allowed the Presidents to take measures in the economic and political sectors within an emergency, having often been invoked by President Pérez during the fourth Venezuelan Republic. The second law of this type was approved in November 2000, which extended the temporary power of “rule by decree” for one year.

These *Ley habilitantes* or enabling laws would centralise more power in the President and allow Chávez to enact laws without having any sort of dialogue with the National Assembly. These were frowned upon by international media, and other countries criticised Chávez for being a dictator. The President would answer these criticisms at the moment of signature of the laws stating:

About [the enabling laws], the Yankees refer to them as a dictatorship because there needs to be dialogue and consensus always. There is always dialogue. (...) Dialogue in different ambits and in different collectives. There is an abundance of dialogue in Venezuela (MariscalVoroshilov99,2010).

This would be the first justification Chávez had to give to sign the enabling laws, stating that democracy was happening every day in the Assembly and the free press ruled all over Venezuela. Thus, even if the President were to have more power, Chávez assured the enabling law would not turn Venezuela into a dictatorship. The second justification for the enabling laws rested on the socioeconomic framework which the new law would enable Chávez to enact upon, the transition to Bolivarian socialism. President Chávez holds the Bolivarian Constitution to his audience and the cameras and reads Article 299 from Title VI *Del Sistema Socioeconómico* (The Socioeconomic System):

The Bolivarian Republic of Venezuela's socioeconomic regime depends on the principles of social justice, democracy, efficiency, environmental protection, productivity, and solidarity to the end of assuring human development as well an existence with dignity and helpful to the collective. [This] to achieve a just distribution of wealth through a strategic democratic planification, participatory, and open consultation (RBV:315-320).

Chávez holds open this article and signs the enabling law promising the transition to Bolivarian socialism will be accelerated.

Later in 2001, the National Assembly approved the second enabling law to allow Chávez to rule by decree. Chávez rushed through forty-nine laws aiming to further the Bolivarian Revolution's objectives in policy areas such as property rights in the hydrocarbon, agricultural sectors, and public education. Hugo Chávez appealed to poor people living in slums and shantytowns, and, for that reason, the new elected President made many enemies. These

enemies constituted the country's white elite, senior generals, conservative businessmen, oil executives and media essentially. Frustrated over land and oil reforms, they also feared Chávez's mobilisation for the poor. Thus, this fraction of the population began a conspiracy to overthrow the government, organising the 2002 coup.

The second of the enabling laws served as the trigger for rapid mobilisation against Chávez and the justification for preparing a plan for overthrowing the incumbent government. These enabling laws, as well as the Land Reform and Laws on Hydrocarbons, were the first indication of Chávez's radical agenda. According to Gott (2015:219-222), Venezuela now faced a sense of crisis with Chávez's government and the oppositions arm-wrestle. Large protests engaged in Caracas from the opposition with a support alliance between the FEDECAMERAS (the employers' federation) and the Venezuelan Workers' Federation (CTV). Joining them was the trade union movement with *Acción Democrática*. These demonstrations of protest and political strikes suggested that Chávez's support was slipping, especially after the Minister of the Interior, Luís Maquilena, was forced to resign, following General Lameda the former boss of *Petróleos de Venezuela* (PDVSA) who had stepped into the opposition's side. This gave the impression Chávez's support was weakening which led the opposition to organise in December 2001 a general strike.

Chávez tried to counter these demonstrations by engaging with the newly enfranchised people and the liberty social movements had gained to launch a new initiative: the Bolivarian Circles. This initiative aimed to encourage people to organise locally into groups and neighbourhoods, ultimately teaching them how to take advantage of government programs (Gott, 2015:222). Thus, prior to the coup attempt, opposition and the Chávez's government wrestled to rival street support demonstrations. However, in the outskirts, the opposition was preparing the 2002 *coup d'état* seeking support within the armed forces, as well as Washington's, whose intervention would be crucial operating through media networks.

Within this context, Washington began to understand Venezuela's situation as deteriorating. Thus, according to a US intelligence brief of April 6th, 2002, Washington states, "Conditions Ripening for Coup Attempt".

Dissident military faction, including some disgruntled senior officers and a group of radical junior officers, are stepping up efforts to organise a coup against President Chávez, possibly early as this month (SEIB, 2002).

However, a few lines ahead, the same document analyses the prospects of the coup to be successful and states that the chances are very limited due to Chávez's core support among

poor Venezuelans, which remained intact. Thus, Washington explained how the Coup was planned to unfold:

(...) [T]he plotters may try to exploit unrest stemming from opposition demonstrations slated for later this month. Protracted strikes (...) could trigger confrontation (SEIB, 2002).

The present document clarifies that although the plotters' plan for a coup was known to the US Government, no efforts were made to inform Caracas. According to Gott (2015:232), the opposition also kept close contact with Spain, as well as the United States. The government of José-Maria Aznar had opposed the Castro government in Cuba, and, due to the closer diplomatic relations Chávez kept with Fidel Castro, Spain held reservations towards Venezuela's government.

In the first 24 hours of the coup, much of the protest demonstrations were focused on the opposition to frame and assure that Chávez had lost the population's support. Also, television had the role in spreading the news that Chávez had resigned from his Presidential post. On the second day of the coup, media appeared at the Miraflores' Palace to show solidarity for President Carmona, who assumed office after the coup', while ignoring the people who started marching on the streets for the return of President Chávez.

The people's demonstration of solidarity towards Chávez during the coup d'état resulted from Chávez political agenda in his presidency's first years. Not only was Chávez's agenda directed to social, educational, and economic development, President Chávez was foremost a soldier with an undeniable connection with the military.

This would be reflected in Plan Bolívar 2000, engaged a few weeks after Chávez was elected president, which would mobilise the armed forces' spare capacity and link with local community groups and civil society to restore the country's infrastructure.

Plan Bolívar 2000 sought to return the military to their social functions so that military forces assume roles both as citizens and military staff, incorporated organically in the democratic, participatory model. This deep connection of civil society with the military was crucial to the opposition forces during the coup'. Chávez was certain of the military's support, and it ended up being the military to call hundreds of people in the poorest sectors of society which supported the military to protest the coup and restore Chávez's post on the Presidency.

The 2002 coup d'état failed, lasting only seventy-two hours before a constitutional democracy and a democratically elected government were re-established. The return of Chávez was the product of combined efforts from both the Venezuelan society, including citizens, government,

and military officials. The 2002 turn of events ended up legitimising and fortifying Chávez's position and power as the President of the 5th Venezuelan Republic. Meanwhile, the mistrust placed upon Venezuela's historical ally grew stronger, reinforcing Chávez's anti-North-American speeches favouring a strong and autonomous Venezuela together with the whole Latin and Caribbean America. Thus started the second phase of the Bolivarian Revolution, culminating in Mar del Plata, 2005.

The present section aimed to analyse the events that triggered the beginning of the Bolivarian revolution, as well as the process to build a counter-hegemonic historical bloc of social forces under a CDA methodology.

The Summit of Miami in 1994 represented the hegemonic consensus established and protected by the United States, a consensus that requires an economic model of neoliberal capitalism, allied with liberal representative democracy, to be universally consented to. Thus, according to Robert Cox (1993:49-66), world hegemony emerges from the convergence of compatible interests from a global civil society that operates on a world scale. As mentioned above, Robert Cox describes a globally-conceived civil society "as a mode of production of global extent which brings about links among social classes of the countries encompassed by it" (Cox, 1993:49-66). In the "Declaration of Principles", produced for the First Summit of the Americas, this global civil society becomes observable in the document signed by the Heads of State and Government. According to May (2014:70), this global civil society manifests itself through the rule of law towards the establishment of a dominant and US-inspired global society focused on democratisation and liberal market society. Thus, in the international sphere, the international rule of law is justified within a collective good to build a global system of governance. A neoliberal global hegemonic order is yet to be established, and therefore, a political supremacy relies on the rule of law to justify and legitimise any attempt to serve the dominant and interests of global social classes. The rule of law is a tool for the legitimisation and naturalisation of common sense.

In the first paragraphs, the Declaration of Principles states that "the elected Heads of State and Government of the Americas are committed to advance the prosperity, democratic values and institutions, and security of our Hemisphere" (1994). Then, the document is divided into other sections to define the principles under which the Summit would take place. The first section is dedicated to preserving and strengthening Democracies of the Americas, which establishes that representative democracy is indispensable for the stability, peace, and development following the guidelines of the Charter of the OAS (1994). Thus, when in the final paragraph of the present section states the following:

We will work through the appropriate bodies of the OAS to strengthen democratic institutions and promote and defend the constitutional democratic rule in accordance with the OAS Charter. We endorse OAS efforts to enhance peace and the democratic, social, and economic stability of the region (SoA, 1994).

The present statement, in our interpretation, declares that even though the Summit's Principles were numbered according to the OAS Charter, this institution is still closely consistent with US foreign policy towards the region.

The second paragraph is dedicated to the principles for the summit concerning Economic Prosperity. The document goes as the following:

Our continued economic progress depends on sound economic policies, sustainable development, and dynamic private sectors. A key to prosperity is trade without barriers, without subsidies without unfair practices, (...) [e]liminating impediments to market access for goods and services among our countries will foster our economic growth. (...) Free trade and increased economic integration are key factors (...) (SoA, 1994).

These statements serve to demonstrate the principles which the first Summit of the Americas in Miami based upon, which were in turn written according to the OAS Charter. Thus, if the OAS Charter is consistent with US-Foreign Policy and if this institution actively denounces and rejects the adherence of members who endorse Marxism-Leninism, excluding Cuba, then the inclusion of the OAS Charter Principles could be interpreted as the presence and predominance of a mode of production of global extent, linking social classes of the countries encompassing it, according to Cox, this would be translated as a globally-conceived civil society (Cox, 1993:61).

Meanwhile, Fidel Castro invited Hugo Chávez to Havana to attend the "Summit of Rebels" in Havana to express a counter-hegemonic agenda, understood as emancipatory vis-à-vis the "Spirit of Miami" by its promoters.

The events which occurred in Latin America during this period, and the discourses through which they were described and understood by the actors involved in these events, can be described, from a neo-Gramscian perspective, as a process of denaturalisation of the existing hegemonic common sense to replace it with a counter-hegemonic alternative. This could be represented in a speech given by Fidel in 2005:

Only a broad Latin Americanist vision, which acknowledges the impossibility of our countries' developing and becoming truly independent, (...) will be capable of achieving what Simón Bolívar called for (...) and that of José Martí. To differentiate

it from the other America, the expansionist one with imperialist appetites (Gott, 2011:315).

The present section thus concludes that a national-based counter-hegemonic historical bloc was formed in Venezuela. The next section demonstrates the process of transnationalisation of the Venezuelan historical bloc, which had expression through ALBA.

4.3. The Transnationalisation of the Bolivarian Revolution

As mentioned above, according to McCarthy Jones, the Bolivarian Revolution can be divided into two main phases. The first concerns the period prior to Hugo Chávez's first election as President in 1999 and the 2002 attempted coup against his government, which consolidated and legitimised Chávez's Presidential power. Additionally, the first phase is marked by appeals to the reinvention of a visionary past through the constant summoning of historical figures as well as the reinvention of both democratic models and socialism (Roniger, 2019). The second phase was characterised by a growing autonomy of the state, towards both the opposition forces and foreign powers, due to the reinforcement of Chávez's legitimacy post-2002, but also via the reinforcement of his presidential powers. Venezuela's new foreign policy was expressly focused on regional solidarity through the Bolivarian project, as well as the introduction of Latin America in the global framework through a "new strategic map" (Roniger, 2019).

According to McCarthy-Jones and Turner (2011), President Hugo Chávez aimed to redefine Venezuela's role in the international system, presenting the "new strategic map" in November 2004. This strategic map consisted in the conceptualisation of a multipolar world, identified through five different regions Chávez considered to be the main poles of global power (Africa, Asia, Europe, North America, and South America). The new strategic map helps to understand Chávez's plans for Venezuela's foreign policy. On the one hand, it aimed at the construction of the multipolar world, supported by anti-North-American rhetoric and the attempt to defeat imperialistic forces. On the other hand, the fulfilment of Bolívar's emancipating and integrational project in 21st century Latin America.

To achieve this, Venezuela's foreign policy began to engage in the strengthening of regional integration and solidarity through an incremental process of institutionalisation (McCarthy Jones, 2015:47-66). In this context, the Venezuelan leader assumed a revisionist attitude towards neoliberal policies and the Washington Consensus in the region (Roniger, 2019). Ultimately, the view was that to liberate Venezuela from the United States economic and geopolitical dominance; it was necessary to solidify Venezuela's sovereignty via an

international strategy of promoting regional integration processes that constituted an alternative to the Washington-led regionalism in Latin America (McCarthy Jones, 2015:47-66).

The USA strategy in Latin America was characterised by the promotion of a Pan-American integration approach that would combine expressions of leadership in the post-cold war world, with a security agenda, associated with the expansion of trade and the capture of natural resources. For example, Pan-Americanism also revived the memory of North-American historical figures, such as Thomas Jefferson and James Monroe, to legitimise the Washington-led integration strategy, promoting an America for the Americans (Anderson, 2015:13-46). According to Anderson (2015:13-46), early 21st century revived Pan-Americanism ideas included the following agenda: The implementation of harsh measures towards the isolation of socialist Cuba; the expansion of NAFTA; the strengthening of the US Southern Command; and the ALCA initiative.

The most crucial of the objectives of the Pan-Americanism strategy was related to the deepening of trade and investment agreements embodying many of the Washington Consensus guidelines. The first Summit of the Americas in 1994 would materialise the spirit of Miami in the ALCA 1998 draft in liberating trade in the promotion of economic growth, compelling investment, and the tightening of property rights within clear, transparent, and stable rules for investment and trade (Anderson, 2015:13-46). However, at the same time, it meant the extension of the world market through economic growth and *trickle-down* benefits; it would translate into restraints on the democratic control over public and private economic institutions (Anderson, 2015:13-46). The ALCA initiative is a perfect example of the imposition of New Constitutionalism in Stephan Gill's (2014) understanding of the term. It is helpful to recall New Constitutionalism as a process to support transnational liberalism while favouring liberal democracy as the sole model for development. According to this mechanism, proceeding at the global level, it is concerned with global capital, both national and multinational (Gill, 2014:68). According to May (2014:63-76), the rule of law is mobilised to ensure policy remains consistent with constitutional requirements reinforcing the commitments for further neo-liberalisation. The rule of law is a powerful New Constitutionalism tool because it is a method in which powerful social forces' interests shape political and economic relations that can be established legally.

Thus, the rule of law underpins political/economic power as disputes articulate within a legal system and its constitutional expressions. New constitutionalism develops political and legal

structures to advantage certain groups, limiting political engagement through constitutional means because there is a *pre-commitment* to the rule of law (in the Westernized arrangements) as the sole approach to development.

This concept is being recalled expressing the ALCA initiative as an example of how New Constitutionalism works and how the rule of law is used to create and maintain supremacy relations. Both the Summit of the Americas in Miami 1994 and Mar del Plata 2005 states that the Summits had taken place in accordance with the principles of the OAS Charter. These principles, among others, are the development of partnerships through economic integration and trade, committing to the eradication of poverty, inequality, and social exclusion, thus strengthening democratic values (SoA, 2005). The OAS, founded in 1948, a period of tremendous US power contrasted with a weak and divided Latin America, was closely connected to the Pan-American integration strategies which embodied within the United States a paternalized leadership over Latin American countries. Thus, the Charter of the OAS could be the product of the *pre-commitment* to the rule of law in the US attempt to normalise a certain definition of development, interpreting what is fair and just, what is prosperity, and how to attain it for the American continent. Suppose this definition is present in the 2005 Summit of the Americas. In that case, the final proposals and product of these international meetings are also a reflection of the OAS and thus of the US interests for the region and normalised definition of development which would include, between others, the expansion of free trade within a liberal democratic system.

The ALCA initiative is not only a reflection of the OAS charter, having some objectives in common such as the economic integration and the eradication of poverty through the creation of jobs and the strengthening of democratic governance; it is also a product of the process of globalisation and neoliberalisation. Thus, while the OAS provides a standard understanding of development and prosperity for the American continent, normalised as the base document within the rule of law, which provides the guidelines for American development, the ALCA agreement is a product of that definition used to open the markets of Latin America, with neoliberalisation as its ultimate objective.

However, the ALCA draft was published when the UN-led industrialisation strategies had failed, and the IMF abolished the concept of “structural adjustment” from the lexicon due to their failure and, above all, due to the Latin American nations’ resistance throughout the 1980s and 1990s decades. Thus, the idea of an alternative to the ALCA initiative would certainly attract interest.

Chávez's new strategic map included an approximation to Cuba. This expansion of Venezuelan diplomatic relations to Cuba clashed with the USA's geopolitical agenda of isolating Cuba. Furthermore, it collided with the fundamental revival of Pan-Americanism which intended to exclude Cuba from regional integration. Furthermore, between 1999 and 2004, Chávez promoted the idea of a Confederation of Latin American and the Caribbean States, which resulted in the institution of ALBA, co-founded with Cuba, as an alternative regionalisation process to the US-led integration framework of the ALCA (Anderson, 2015:13-46).

ALBA came to be in this context in the first period of the second phase of the Bolivarian Revolution. In the tenth anniversary of Chávez's encounter with Fidel Castro and the Cuban people for the "Summit of Rebels" in Havana, on 11th December 2004, Chávez returns to Cuba as the Venezuelan Head of State for the formalisation of the *Alternativa Bolivariana de las Americas* (ALBA or Bolivarian Alternative for the Americas).

ALBA constitutes the antithetical version of the ALCA, with the former's head of states describing this neoliberal initiative as the "most polished expression of the appetites for domination over the region and, if it were to take effect, it would constitute a profound neoliberalisation which would create levels of dependence and subordination without precedents" (ALBA, 2004). ALBA was established in a clear rejection of the contents of ALCA's agreement, affirming aspirations towards Latin American and Caribbean (in opposition to Pan-Americanism) integration for the development of a regional bloc. The bloc would be built within Latin Americanism foundations, that is, with the objective to build a *Patria Grande* (Great Homeland) for the people of Bolívar, Martí, and other Latin American leaders, envisioning a postcolonial fraternity. It would be built through developmental guarantees, south-south cooperation, and cultural protection for the mutual integration and benefit of the Latin American people.

The ALBA's Summit's Joint Declaration expresses, in the first place, that both leaders articulate themselves in the same rhetoric from the Summit of Rebels which had taken place in 1994. The summoning of historical figures in expressions of grandeur was present and stressed the urgent need to recover sovereignty from the imperialist powers through solidarity. ALBA also tackled social development through the engagement of "social missions" in the education, health, and habitation sectors which shows the employment of military terms in politics due to both leader's military service and leadership.

The Bolivian government, which would soon join ALBA in 2006, had a crucial role in this latter process, giving a voice to people and social movements, especially to the indigenous

people (Anderson, 2015:13-46). In this sense, ALBA became an alliance, an evolving alternative project based on promoting an integration model beyond free trade and political integration, thus embracing a model based on cooperation and solidarity and complementarity and cooperation (Anderson, 2015:13-46). The main differences between the ALCA and the ALBA project will be further discussed in the next section about the Mar del Plata Summits. The following arguments focus on institutions founded by ALBA to pursue the Bolivarian challenge.

ALBA founded *Telesur*, a multilateral television to broadcast multilaterally Latin America's democratic, participatory struggle. As mentioned above, the media played a big role in the 2002 coup attempt against Hugo Chávez's government. Aware that international organisations and other powerful nation-states used media to provide objective guidelines and to promote their private interests, constituted a crucial limitation to the self-determination and autonomy of ALBA nations, in 2009, ALBA members signed a Joint Declaration for the inauguration of a TV Station of the South, *Telesur*.

“Those who attempt to intervene, base their vision on the old and decadent international order of information and communication, which has established a media dictatorship throughout the world, supported by the impressive development of telecommunications that has taken place during the last decades of the 20th century” (ALBA, 2009).

Telesur, a 24-hour regional television station, is perceived to directly oppose the North American CNN within a project to democratise the member states' radioelectric space, adding over three hundred community radio and TV stations and launching the Simón Bolívar satellite (Gott, 2011:318). According to Roniger (2019:23), the TV station would promote and represent the Latin American reality and break the reproduction of domination paradigms that omit the marginalisation of the poor, of social movements and the effects of neoliberal globalisation, and of imperialism.

The discursal impact was reflected in the numerous inter-state alliances driven for the region. Besides ALBA, the Latin Americanism integrational strategy saw the creation of other regional institutions like UNASUR and CELAC, the recreation of MERCOSUR, interstate projects like *PetoCaribe*, *Telesur*, *Banco del Sur* and, *Gasoducto del Sur* (Roniger, 2019). *PetoCaribe* is an initiative founded in 2005 by Venezuela to provide subsidised oil from Venezuela to 17 countries in the Caribbean and Central America. In 2007, *Banco del Sur* was founded in Buenos Aires. It would serve as the substitute institution to the World Bank and the IMF, which was to be funded with Venezuelan oil money and distributed between Latin American countries

towards their development. Finally, the *Gasoducto del Sur*, as well as the Transcaribeño, are new projects for cooperation towards financial and energetic sovereignty in the region.

ALBA had become focused on integration-based cooperation, solidarity, towards a common will, materialised through what Chávez called 21st century socialism which values direct democracy, control from below and, economies which benefitted the masses. ALBA's 21st century socialism manifests into its exchange system between member-states, in a non-traditional or monetary way, similar to bartering. This allows the engagement of countries that usually are not able to participate in trade in a monetary manner (McCarthy Jones, 2015). Chávez explicitly states in the Mar del Plata Summit that although he respects free trade, the Latin American issues on poverty and development are not going to be solved through neoliberal strategies. Instead, the system would flow like the following.

Yesterday we made an agreement with our brother Kirchner to place in Argentina some 5,8 million of *diesel*, but they are not going to pay with money. (...) They are going to pay in technological transfer for the agricultural development, which Argentina holds a great advantage. Argentina is also providing medical equipment against cancer, and that is how they pay the fuel bill. With Uruguay, they are paying us with cement (Cristina Fernández Kirchner, 2015).

This system would be adopted by ALBA member countries, which would replace free trade. The “missions” specialised in housing, education, and health were also seen as fundamental to reinforce the development and sovereignty of member-states, as well as the model of participatory democracy that was promoted by member-states and reinforced within ALBA itself with the creation of the CMS in 2007 to create the means of connection of social movements with the national governments participating in the ALBA project.

The most fundamental characteristic of the ALBA project can be perceived as the continuation of the philosophic and political projects of the liberators who roamed Latin America 200 years past. Bolívar and Martí left Venezuela to fight for sister nations for the struggle for independence and the consequent foundation of Republican systems (Chacón, 2013:33-45). Thus, the understanding of socialism for the 21st century integrates and propels social movements to a crucial standing, the resistance of indigenous cultures, and other movements that became vociferous during the Bolivarian Revolution (workers, students, women, peasant's social movements, etc.). This protagonist role given to social movements during the Bolivarian Revolution was not only reserved to the Venezuelan political life but was meant to also take shape through ALBA and the CMS.

According to Mike González (2014:66-90), it is hard to locate the socialism for the 21st century within one or other political traditions. In 2005 Hugo Chávez seized the attention of the world leaders and social movements in the World Social Forum, meeting in Porto Alegre, Brazil. The political leader announced that Venezuela was embarking on the road of twenty-first-century socialism. Although Chávez refers to Marx and Engels, recognises Che Guevara's revolutionary transitions, and even praises China's economic miracle, he admits in Porto Alegre speech that the 21st century socialism must be reinvented to attempt and transcend capitalism to solve poverty and social exclusion problems:

“We must reclaim socialism as a thesis, a project, and a path, but a new type of socialism, a humanist one, which puts humans and not machines or the state ahead of everything” (Sojo, 2005).

From the perspective of regionalism analysis, the 2000s decade was one of transformation. The narrative in the 1990s, associated with neoliberal triumph and the spread of globalisation, triggered models of regionalism that sought to resist the persistent narrative around free markets and free trade. This alternative regionalism narrative is centred on the returning of the state, of politics, of the development agenda, and of the consolidating of sovereignty as the means and ends to regionalism (Cusack, 2019:57-92). However, this does not mean that neoliberal and trade-focused agendas of regionalism ceased to exist; it merely means that their centrality was displaced (Briceño-Ruiz, 2018). Thus, ALBA came to be in the fourth wave of regionalism, the post-hegemonic period, which explains a period in Latin American regionalism with no unique narrative about integration that combines emerging regional institutions trade-oriented, like the Pacific Alliance (2011) as well as institutions like ALBA which embraces solidarity-based, south-south cooperation. Consequently, despite the Pink Tide governments, this period is marked by diversity, compared by Dábene as a patchwork quilt. According to Dábene (2012), this could be partly due to the sovereignty trap, that is, the agendas some key political actors developed and, consequently, the post-hegemonic era never managed to fully build a coherent and convergence of political project. This would prevent the leftist government from surpassing the threshold to the supranational sphere in fear of overlapping key private sector's interests (Dábene, 2012). This is particularly true in Venezuela and the contradictions the Bolivarian Revolution faces against energetic resource extraction. This argument will be further explored in the fifth chapter.

ALBA was first conceived as a path to tackle the ALCA; however, it became an alliance that seeks to create a multipolar world backed by anti-imperialist discourse. ALBA, as well UNASUR, share the principles of solidarity, cooperation, and complementarity, politicised by

understanding trade not as an end but as the means to development. Both institutions were conceived to represent a counter-hegemonic alternative to USA's hegemonic agenda (Dabéne, 2018:51-63). However, some countries like Chile, Peru, Colombia, and Mexico signed the foundations of the Pacific Alliance to represent an alternative to ALBA and UNASUR's non-capitalist model of integration (Briceño-Ruiz, 2018). Thus, representing a period in Latin American regionalism without a unique regionalisation model, a patchwork quilt.

ALBA, inserted in a struggle against the US-sponsored neoliberal integration agenda, was a product of Chávez's new strategic map to building a multipolar world order. This struggle can be characterised as a counter-hegemonic movement against the Washington Consensus and the unipolar order erected after the end of the Cold War. Venezuela's Bolivarian Revolution built a counter-hegemonic historical bloc of social forces capable to transnationalise through Bolivarian Alliance, ALBA. The transnationalisation of ALBA's social forces may be due to the newly gained role of social movements through the model of participatory democracy. The final section of the present chapter aims to contextualise the first time the counter-hegemonic historical bloc of social forces acted as a regional bloc to struggle against the hegemonic power and commonsensical speeches at the Mar del Plata in 2005.

4.4. The *Mar del Plata* Summits

The present section aims to describe a key moment in ALBA's counter-hegemonic movement, the 4th Summit of the Americas took place in Mar del Plata, Argentina, in November 2005. ALBA, meaning "dawn" in the Spanish language, is represented as the beginning of a new Era for the Latin American regional projects. Keeping in mind the neo-Gramscian theoretical framework described in the chapters above, ALBA could be identified as a counter-hegemonic regional institution which, in geopolitical and ideological terms, may extend beyond Latin America, as well as the Caribbean regions (Muhr, 2010).

The Bolivarian Alternative was founded to counter ALCA, promoted by the United States, and the Pan-American regionalism strategy for the 21st century. It expressly promoted an alternative model of integration for Latin America. ALBA aimed at integration to ultimately preserve and solidify sovereignty, independence, and identity by promoting social development, eliminating poverty, and reducing social exclusion, giving social movements a crucial role to workers, students, small farmers, and women.

The agreements between Cuba and Venezuela in the first Havana Summit 2004 were expressed in a collection of distinct trade, aid, investment and, integration deals stressing south-south

cooperation, alongside social and industrial development as opposed to the US-sponsored ALCA agreements, which mostly assured access for corporations. Thus, in the initial moment, ALBA expressed an alternative to the world order, and the commonsensical consensus circling Washington's agenda, emerged from the end of the Cold War, thus named *Alternativa Bolivariana para Los pueblos de América* (Bolivarian Alternative for the People of our America).

ALBA, in its initial *Alternativa* (alternative) moment, expressed a reaction to the neoliberal agenda, which was perceived in its member-states as having provoked the collapse of health and education services, as well as the weakening of the state through the privatisations of companies during the previous decades. The Joint Declaration (ALBA, 2004) asserts principles along the lines of just and sustainable development, which guarantees access to benefits for every nation. The main confrontation between ALBA and the antagonist neoliberal initiative ALCA is the distinction between cooperative and competitive negotiation models. According to Hernan Vargas (2021), cooperation and solidarity are ALBA's currency in the sense that it focuses on funding the implementation of measures towards a less dependent Latin American on foreign capital and investment. Thus, ALBA is an institution based on cooperation. This is the member states common trade to guarantee social justice, prioritising the peoples' well-being and struggles instead of capital accumulation. This opposes ALCA's competition from the neoliberal model in which unequal negotiations are engaged with big financial powers who usually win the contest.

Other confrontations can be added between the ALCA initiative and the ALBA. According to Hernan Vargas (2021), the ALCA would represent the annexation of the Latin American peoples, consolidating the US, neoliberal supremacy over South America whilst ALBA clearly emphasises the idea that the world should be multcentred, an idea which had its origin in Chávez's "new strategic map." Finally, ALBA represents the notions of "delinking" by Samir Amin, suggesting that every nation should be subjected to its own imperative of internal development, thus rejecting the idea that neoliberal capitalism is inescapable. He further describes this idea in his book "*Delinking: Towards a Polycentric World*" (1990), stressing the need for polycentrism, which expresses the existence of several systems of development, an alternative to the neoliberal development system. Thus, ALBA's role in this polycentric world would be to link peoples struggles to carry on an alternative development system.

Starting in 2004, ALBA developed the initial Integration Agreement signed between Cuba and Venezuela. From then on, the ALBA group had grown to eight nations Venezuela, Cuba, Bolivia, Nicaragua, the Dominican Republic, Ecuador and St. Vincent and Grenadines,

Antigua, and Barbuda. Honduras also joined ALBA; however, it withdrew after a military coup in 2009 (Anderson, 2015:13-46). In 2006, an extension to ALBA was proposed by President Evo Morales, the “People’s Trade Agreement” to contrast with a neoliberal agenda of a free-trade agreement and thus promote an alternative, just model of trade.

ALBA would soon be renamed the Bolivarian Alliance for the People of our Americas after gaining an integration momentum (Muhr, 2010). Chávez stated in the 6th Extraordinary ALBA Summit, “Some of us have been discussing and, even if [ALBA] still maintains its conditions as an alternative, we can call it an Alliance.” From 2009, ALBA now represented an alliance for the people of Latin American against the imperial world powers in order to include Latin America among the world powers of the world.

This study has established ALCA’s and ALBA’s main differences and the points where these two integration projects clash. However, the question remains, why was the Mar del Plata Summit so relevant?

The IV Summit of the Americas in Mar del Plata 2005 would start in force the ALCA final document for the agreement of a free trade area “From Alaska to Patagonia” (FTAA, 2003, envisioned from the first Summit of the Americas held in Miami 1994. The 4th Summit of the Americas in Mar del Plata, Argentina, would mark the first time ALBA defeated the world’s leading power plans, represented by President Bush’s free trade and neoliberal policies, collectively, as a regional bloc (Stone, 2009). It also marked the beginning of a political alliance between Venezuela, Argentina, and Brazil and their respective leaders, Hugo Chávez, Nestor Kirchner, and Lula da Silva, to build an alternative regional project. The project would include the consolidation of Mercosur, ALBA, and the creation of other regional organisms like UNASUR and CELAC, which would exclude the United States and Canada to include the blocked Cuba (télam, 2020).

Chávez, Kirchner, and Lula becoming conscious of the meanings of ALCA developed a diplomatic alliance to obstruct the progression of the free-trade agreement. The fundamental differences between ALCA and ALBA, as was mentioned above, can be expressed in the antithetical models of integration for the Americas between Pan-Americanism and Latin-Americanism. More specifically, between ALBA and ALCA, two different models of economic and development systems (free trade and cooperation-based social development), as well as two models of democracy (representative and participatory), come into play against each other in Mar del Plata.

From the 4th to the 5th of November 2005, Nestor Kirchner, the President of Argentina and the host of the 4th Summit of the Americas, triumphs to detain ALCA's progress. Kirchner opened the Mar del Plata Summit of the Americas as the host and stated loud and clear that the ALCA agreement was, in fact, a still-born project. Rallying against international financial institutions, the Washington Consensus, the idea of the free market as a panacea, agricultural subsidies, and the ALCA, Kirchner stated (Fuentes, 2005):

“Simply signing an agreement will not lead to an easy and direct road to prosperity. (...) [US's] role as first global power, [needed to consider] its policies towards the region as they not only provoke misery and poverty but also to institutional instability. (...) Our poor, our excluded, our countries, no longer accept that we have to keep talking in a low voice” (Fuentes, 2005).

Meanwhile, parallel to the Summit of the America's “ALBA express” (Fuentes, 2005) would arrive in Argentina to host the “Summit of the People,” joining together a crowd 40 thousand people on November 5th, as well as Evo Morales, Diego Maradona and the Argentine Nobel Prize winner, Pablo Neruda. Hugo Chávez, in an hour and a half long speech, would mark the diplomatic defeat of ALCA with the following double-task:

“Bury ALCA and the imperialist, capitalist economic model on the one hand, but on the other hand, it is up to you, comrades, to be the initiators of a new time, the initiators of a new history... the initiators of ALBA (...) for the peoples of the Americas, a real liberating integration, for liberty, for equality, for justice and for peace” (Fuentes, 2005).

Thus, on the one hand, the first task consisted of defeating ALCA, which stayed in the Latin American memory as the first victory against the Washington Consensus, the first battle as Chávez called it. On the other hand, the second task remained to the peoples' responsibility, through the new democratic model, the Bolivarian participatory democracy, to defeat the capitalist model and build an integration project for the peoples of Bolívar.

This event marked the thousands of people present in Mar del Plata. To Hernan Vargas (2021), the Cumbre de Los Pueblos represents a message to the world powers, recollecting the events in Mar del Plata. When the Mar del Plata Summit of the Americas planned to globalise further neoliberalism, the Latin American people rejected this project to send the message that the end of History had not arrived, and that neoliberalism was no longer hegemonic in Latin America. It is important to stress that even though the ALBA is inspired by Venezuela's 21st Century Socialism, the Cumbre de Los Pueblos in Mar del Plata 2005 did not propose socialism but demanded an alternative to neoliberalism. This was the message the people wanted to send to the Summit of the Americas in Mar del Plata.

Mar del Plata means, for me [Hernan Vargas], the beginning of contradictions, the possibility of contradiction in our continent because so far there was not supposed to be contradictions, and everyone would believe in neoliberalism. However, 2005 proves that is not true (Vargas, 2021).

To conclude, if the FTAA was a failed attempt to materialise an effort to create the rule of law supporting a specific mode of production, in this case, neoliberal capitalism, to exercise supremacy over a fragmented population, Mar del Plata at *Cumbre de Los Pueblos* in 2005 was the first time in which Latin America formed a coherent opposition to neoliberal supremacy. As a result, dissent emerged, ALBA was founded and formalised between Cuba and Venezuela and, the subordinated classes were encouraged to organise against neoliberal supremacist rule of law.

The next and final chapter to this dissertation will focus on the people and social movements carrying out the Bolivarian Revolution and using the Bolivarian Constitution (RBV, 1999) to fulfil their collective agenda on the sectors of education, housing, and health. The CMS will be given a historical context and analysed similarly to the present chapter, using a CDA approach. The final purpose of the final chapter is to analyse the present study's hypothesis, the double-turn of counter-hegemony, to study the tensions and contradictions and tensions between ALBA member states and social movements within one common struggle, the development model and environmental protection.

Chapter 5: The Bolivarian Revolution's Tensions and Contradictions

5.1. Introduction

The previous chapter demonstrated the evolution of the Bolivarian Revolution, the construction of a counter-hegemonic historical bloc of social forces within a national framework, and its transnationalisation via ALBA. This process culminated in Mar del Plata. The present chapter aims to discuss the dilemmas of counter-hegemonic movements and considers the reasons for the increased fragmentation and weakening of the counter-hegemonic movement that finds institutional expression in ALBA. The present study interviewed an activist of the *ALBA Movimientos*, Hernan Vargas (2021), who described the role of the national states as an intermediary one, standing between, on the one hand, the social movements that were given a big role in the development and self-governance of communities throughout Venezuela, and, on the other hand, the global sphere and transnational capital.

The present chapter aims to explore the contradictions of the counter-hegemonic movement of which ALBA is an expression by highlighting the tensions between Venezuela's national-based social movements struggles and the Venezuelan government. The first task of the present chapter is to demonstrate what the Bolivarian Constitution truly meant to social movements, their path to autonomy, self-government, and ultimately, to the communal state. On the other hand, the newly gained rights for social movements translated into big changes to the middle class and the central government, which ultimately created tensions and contradictions, leading to a weakening of the Bolivarian movement.

The present chapter focuses on three dimensions of agency. These are the social movements, the state, and ALBA. There is a fourth dimension, which pressures the latter dimensions, which is the international sphere representing the neoliberal supremacy weighing on Latin America and the Pink Tide governments. Thus, the present chapter aims to demonstrate that even though social forces were able to successfully reconfigure the state in Venezuela at the international, transnational level, neoliberal hegemony is still thriving and shaping the international context in which Pink Tide governments seek to promote their sovereign economic development. This situation ultimately places pressure on these governments, contributing to the development of contradictions that ultimately fragment and weaken the counter-hegemonic historical bloc that arose with the Bolivarian Revolution and finds transnational expression in ALBA. This chapter explores these contradictions by focusing in particular on the tension that is increasingly felt between the agenda of rapid sovereign economic development sought by Pink Tide

governments amidst a hostile international context and the environmental costs such an agenda implies, which clashes with social movements concerns.

In order to discuss these contradictions, the first section focuses on Venezuela's historical bloc of social forces. Here, an analysis is provided of the tensions within Venezuela's Bolivarian Revolution's historical bloc, demonstrating the clash between Venezuela's social movements and the state, which, in its dire need to promote economic development, clashes with social movements' concerns, leading to increasing attempts on the part of the government to silence and subvert the autonomy of the social movements.

The second section discusses these contradictions, as expressed through ALBA. There are contradictions of numerous kinds, such as discussions over development and economic models or democratic systems; however, the present study chose to emphasise the contradictions which emerge in the context of economic development and its environmental costs, which is not only relevant in present times, but it is also transversal to the three dimensions which are going to be explored in the present chapter.

The deepening of tensions is parallel to ALBA's weakening. In this case, CDA will serve this argument to extract the narratives which demonstrate the pressures and tensions between the four spheres of agency.

5.2. National-Based Social Movements

The Bolivarian Constitution became the means of social movements to guarantee the rights of the unrepresented people. According to Hernan Vargas (2021), in the year 2000, over 60% of the Caracas population was represented in the maps of the capital as green areas. These areas were occupied by slums, the *barrios*, as people were made invisible prior to the approval of the Bolivarian Constitution. This is an example where the 1999 Constitution allowed the Caracas population to mobilise to guarantee their rights through a participatory democratic system. People started to build strategies to overcome their communities' issues like suffrage, water supply, education, among others.

The 1999 Constitution defends some principles and rights which equip the people with the means to achieve them through mobilisation and self-governance. Hernan Vargas had the opportunity to work with both the central government, more specifically with the Communes Ministry, as well with social movements, participating directly in the communes themselves. "I was working from both sides of the shop" (Vargas, 2021). Hernan Vargas thus explains that, in Venezuela, there is more than one way to obtain power beyond being elected; people can

take power through institutions, through mobilisation, from the development of means to control the means of production and self-governance.

More specifically, this means that people's struggles and participation must be expressed actively and permanently, voluntarily, and autonomously. In this sense, given the present concept of popular sovereignty, the self-attributed role of the Bolivarian state is to try, on the one hand, to strengthen the national state's autonomy from other national potencies and guarantee the integration of the peoples of Latin America, as well their economies, as a symbol of international solidarity while, on the other hand, to stimulate the popular sovereign and recognise its power. Ultimately, the people's interests would be harmonised with the state's interests because the state's interests are the peoples' interests and vice-versa (Arenas & Obediente, 2015:242-245).

According to Arenas and Obediente (2015:241-252), 2007 saw the launch of the *Proyecto Nacional Simón Bolívar*, the first socialist plan towards the socio-economic development of Venezuela. The plan was directed according to the fundamental principles of the Bolivarian Constitution with the aim to establish full, direct, and protagonist democracy as the means of exercising popular sovereignty. The revolutionary democracy would thus be accomplished through the amplification of participating institutions in public management; the edification of a new political culture based on solidarity; the organisation of a public sector at the service of the citizens; the structuring of a socialist productive model oriented towards human needs instead of capital reproduction; and the consolidation of a national communicational system.

The National Simón Bolívar project is a proposal of high generalisation with the intention to open to the comrades the participation of Venezuelan civil society in the difficult process of definition and construction of the solidaric type of life (Frías, 2007:5).

Thus, according to the Bolivarian constitution, solidarity and mutual help are the keys for the construction of 21st century socialism, and the core of the Bolivarian socialism is integrated within the communities, the communal councils, the technical tables (*Mesas Técnicas*), the committees and finally, the communes. These institutions are the foundations of popular power, the very expression of sovereignty.

The communities, the *barrios*, towns, and cities must count on the mechanisms and power to rule in a system of self-government which allows the people to decide over their matters through processes and structures created by their own breast (Frías, 2007:8).

Plan Bolívar 2000 would have a great role in constructing the communal state, thus promoting solidarity and mutual help through the dispatching of military forces to direct the local

communities towards self-sufficiency. The *Plan Bolívar 2000* was to mobilise the spare capacities of military social forces and link them to local communities' civil society to make an impact on the development of Venezuela's local infrastructures. This plan would be divided into three phases. The first one, *Pro-País*, would involve the military forces for the provision of social service; *Pro-Patria* would involve the military in helping local communities to seek local solutions; and finally, the last stage of the Plan, *Pro-Nación* would involve the military to help launch the local communities and the country towards economic self-sufficiency and endogenous development (Gott, 2011:178).

According to Kozareck (2017), there were several types of property in the Bolivarian Revolution. There is private property, concerning what belongs to individuals; there is public property, representing what belongs to the state; social property, which although belongs to the state, the people are involved in controlling the property; and direct property, which belongs directly to communes and the communal councils and rests within collective administration. This section will direct special attention to the communal councils and the communes, which expressed the power of the people in multiple areas for the exercise of popular sovereignty and the management of their direct property (Arenas & Obediente, 2015:253-263).

According to Kozareck (2017), A Venezuelan commune is a self-defined geographical area based on shared historical memory, cultural features, practices, and customs, the productive activities that sustain the community, sharing also similar struggles. This last point is considered the essence of the commune, which is based on the principle of popular sovereignty, constituting a place where people can define and decide their own fate through mobilisation, direct democracy, and self-governance. To participate in the processes of decision-making, the communes have communal councils, divided into committees (depending on the reality of the community) whose role is to develop policies in the people's interests and according to their needs and must be passed through a citizen's assembly where every habitant has the right to vote. Thus, the communities divide into land, water access, health, education, women's rights, and others.

According to the organic law of the communes, the purpose of the commune is to gradually replace the current political system with a Communal state, which involves the construction of a political, social, and economic horizon for the Bolivarian Revolution (Kozareck, 2017). This horizon directs to a system based on integrated communes in communal cities and regional federations which articulate policies and projects at the national level. As Chávez wrote himself in the *Livro Azul*:

A system of government that opens with unlimited amplitude the necessary spaces where the people, the popular masses, are deployed creatively and effectively to obtain control of power to make the decisions that affect their daily lives and their historical destiny (Frías, 2017:8).

However, as Kozareck (2017) states, “that is the theory and the vision, but let us get back to the reality of the communes.”

Only in 2009 was the approval of numerous juridical instruments confirmed, which would assure the bases of the Communal State. Between others, the Organic Law of the Communal Councils (2009) and the Organic Law of the Communes (2010) would recognise the communitarian organisations by the state as the means to the construction of socialism. They would be the cell for the Communal state, according to Margarita Maya (2018), “the socialist space” towards self-governance of the communities to articulate all the communal councils and every communitarian social organisation. However, between 2010 and 2012, only 50 communes were formally created (Kozareck, 2017). On the one hand, this happened because the communes were obliged to reach a certain set of requisites to be recognised by the state as a commune and, on the other hand, because there is a significant lack of legitimacy. According to Maya (2018), the communes are an innovation from above, from a law that had been rejected once in a popular referendum in 2007. Also, the communes started to develop when the apex of the enthusiasm for the Bolivarian project, especially for communitarian participation, had already passed. Until 2006, popular participation was intense, which triggered the approval of policies envisioning the creation of communities independent from the state. From this enthusiasm, the communal councils were created to articulate other participative innovations.

The enthusiasm towards the construction of a communal state weakened because participation, as the means to development and community empowerment, requires decentralisation and autonomy from the state. Although in the first moments, the communal vision seemed hegemonic and, according to Kozareck (2017), both communal activists and government officials were interested in the communal state as a common horizon, this initial enthusiasm waned because of Venezuela’s oil rentier economy, which provoked a lack of productive culture. As was mentioned above, the organic laws for the communes lacked legitimacy from 2007 onwards because they represented a project rejected in a public referendum and, most importantly, because they were implemented from above. Chávez tried to regain legitimacy for the realisation of the socialism of the 21st century through a generous distribution of fiscal resources deriving from the oil income. In the long run, communities did not have the means

to sustain their communitarian projects through self-governance. Examples of this can be found by exploring the issue of environmental protection and climatic justice in Venezuela.

Although coal production cannot equal the income of oil production in economic terms and Chávez has used this economic resource to fund social missions, coal mining is still extremely harmful, causing considerable environmental destruction around the mines. The rivers and forests have been destroyed, workers have fallen ill, and, most of all, indigenous communities who have lost their means to agriculture are especially vulnerable to coal exploration.

The Wayúu are an indigenous community living in the *Sierra de Perijá* (Perijá Mountains) located in the state of Zulia. The Wayúu have been at the centre of the debate regarding Venezuela's economic development model. According to Montiel (2017:205-217), the Bolivarian Revolution is allegedly an advocate of resource nationalism which indicates that the state takes ownership over mining projects. However, few steps have been taken towards this end and to create an economy independent from the extraction of natural resources.

Corpozulia, the Zulia State development corporation, provides mining concessions and makes deals with multinational companies to exploit coal within areas inhabited by Wayúu communities, namely areas surrounding the Socuy, Mache, and Cachirí rivers. North of the Perijá Mountains, there are already two coal mines that were responsible for the displacement of indigenous communities, owned by Corpozulia and multinational companies. Thus, the Wayúu community, afraid of having this experience repeated, maintains a defiant campaign against further mining in indigenous territory. In this campaign, the community maintained a high profile both in the Venezuelan and international spotlight through alliances with environmental organisations (such as *Sociedad Homo el Natura*), gathering the support of Hugo Chávez himself and the Minister of the Environment.

President Chávez could have been a powerful ally to the Wayúu's cause. He had refused to extract coal if its extraction was to translate into deforestation and de-respect for the indigenous territories and publicly demanded to stop coal mining. Chávez also had the power to change Corpozulia's President and its overall development strategy into a more ecological one. However, Montiel states that announcements were made in the media by Corpozulia stating that development in the area was carrying on.

On the other side of the struggle, many actors are arming a counter-revolution. According to Montiel (2010:205-217), in the international dimension, embassies exert pressure on behalf of transnational companies to carry on mining coal on indigenous territory. Examples of this are the British embassy which operates an Anglo-American company functioning in the Mina

Guasare, and the Brazilian company “*Vale do Rio Doce*,” in which North American investors own 70% of its capital. In the national dimension, the Ministry of Basic Industries, Mining, and National Assembly representatives have been supporting Corpozulia (Montiel, 2010:205-217).

What can the Wayúu people do? Montiel states that constant pressure on the government and on Hugo Chávez is crucial:

“If we maintain our pressure, then Chávez will maintain his positions, but if we stop placing pressure, then Chávez will declare that coal [extraction] is good” (Montiel, 2010:214).

However, despite the Wayúu struggle, and while Chávez may have seemed at the time their last ally against Corpozulia’s development plans, Chávez’s need for hemispheric energy integration has come to jeopardise this support. In 2006, Chávez ratified the need to make big development plans to expand coal exploitation in Zulia according to the IIRSA, an infrastructure integration initiative which will be further discussed in the next section. At this point, according to Suggett (2008), Chávez’s declarations started to become out of sync with his actions, and, in 2008, coal concessions had not been repealed by the President and the mines continued to operate. Meanwhile, the Wayúu community was brutally oppressed by Corpozulia during the weekend of Indigenous Resistance Day, October 12th. The Wayúu community gathered in the Socuy River for an anti-coal conference and was received by Corpozulia’s functionaries accompanied by armed National Guard troops who aggressively interrogated and threatened the Wayúu mobilised there (Suggett, 2008).

Still, in the national dimension, there is the National Council of the Indigenous People of Venezuela (CONIVE) and the Ministry of Popular Power for Indigenous People, which should be supporting the Wayúus’ struggles. Instead, CONIVE has been supporting Corpozulia in exchange for personal gain as an instrument in electoral politics. The Ministry of Popular Power for Indigenous Peoples accused the Wayúu communities of being a subversive group and of separatist ideals (Montiel, 2010:205-217).

The Bolivarian Constitution has become, for the Wayúu community, a document of empty words. Under the Organic Laws of the Indigenous Peoples and Communities, the indigenous territories would be protected under an article proposed as “under previous consent of the community, the state can extract natural resources on indigenous land” (Montiel, 2010:213). However, this article was rewritten and approved in a way that the state is allowed to operate on indigenous land despite the community’s opposition. When meeting with the Commission on Energy and Mines supporting Corpozulia, the Wayúu community was faced with the

confirmation of this situation which claimed that the Mining Law was superior to the organic laws which defended the indigenous people and that the Mining Law could not be revoked, however much it was contested.

According to Montiel (2010:205-217), the Wayúu conflict is a testing ground determining the orientation of the Bolivarian Revolution regarding the exploitation of national resources. On the one hand, the Wayúu community and their allies argue that the environment in indigenous territories, and the laws consecrated in Chapter VIII in the Bolivarian Constitution regarding the rights of indigenous people, must be respected. On the other hand, Corpozulia and its allies keep pressuring the Venezuelan state to carry on the extraction of coal from the indigenous territory.

Corpozulia is promoting development projects in the region which in exchange would destroy the Socuy fluvial area. The plan was to build a deep-sea port, Port Bolivar, and a railroad so that the coal mined from the river basins of Socuy's river was shipped more easily. If more coal mines were opened, the significant increase of coal extraction could no longer be able to be shipped solely by trucks. Corpozulia tried to negotiate with the indigenous communities stating that the development planned for the area would result in more jobs, free-ways, schools, and hospitals. However, this development strategy represents for the Wayúu communities the contamination of the environment which would translate into the loss of life due to mining-related health issues. Furthermore, the constitution already protects the indigenous rights to their own educational regime, which means that they would not need schools. These are examples that demonstrate the contradiction of the meaning of "development" for the indigenous communities and the development model promoted by Corpozulia and the Venezuelan state. The latter is considered useless by these indigenous communities, who argue they will not survive if their natural environment is to be disrespected.

The Lake Maracaibo environmental disaster is another example of how Venezuela's dire need for development, desperately attempting to secure autonomy in a hostile international context, results in deep social and environmental impacts on local communities, undermining the historical bloc that supported the Bolivarian Revolution. Similar to the Wayúu's struggle, the Lake Maracaibo environmental disaster also results from the confrontations between social movements and the Venezuelan state's institutions and elites who are motivated towards further energy resource exploration.

Lake Maracaibo has been the epicentre of the petroleum industry and has been classified as an environmental disaster. More than 100 companies are authorised to dump industrial waste into

the lake; the antiquated pipelines and a lack of maintenance causes the leaking of oil and frequent duckweed infestations (Onlus, 2017). These concessions provoked the contamination of the lake with duckweed, interfering with surrounding agricultural lands, and human waste dumping. The communities of fishers have been displaced and caused the downturn of their local business. Similar to the Wayúu community, pollution in the lake had great health and human costs.

Venezuela is motivated to continue intense resource extraction due to foreign tensions and the goal of sovereign economic development and poverty alleviation. Furthermore, although the Bolivarian Revolution propels and promotes the action of social movements, the Bolivarian government has launched social missions to provide for the immediate necessities of the people. Thus, instead of encouraging the local communities to organise and mobilise towards the discussion of the solution for their communities, the struggles have been snuffed out and silenced by the government. This may be the reason the environment may have become “Venezuela’s Achilles Heel” (Kozloff, 2006).

Nikolas Kozloff (2006) attended an environmental conference sponsored by ICLAM (Institute for the Conservation of Lake Maracaibo). This conference is an expression of the abandonment of the local’s struggles for Lake Maracaibo. The environmental conference sponsored by ICLAM is reported by Kozloff (2006) as an elitist event comprised solely by experts in the area, thus excluding the local communities which are currently at risk of coastal sinking due to oil drilling in the east bank of Lake Maracaibo.

The effects of coal extraction in the Perijá Mountain region led to calls for greater engagement between the communes and the Bolivarian government. However, local Bolivarian governors and mayors refused to work with communal structures of direct democracy and created policies without the various communities’ consent (Kozarek, 2017). Most mayors deny to the communes a share of municipal budgets, for example, preventing the communes from mobilising and organising their struggles. One big exception is Julio Chávez, the mayor from Carora, Lara state, who invested the entirety of the municipal budget into implementing participatory programs, outlining the Bolivarian constitution, the local public planning councils, and the communal councils, according to Hartling (2007).

However, the centralising trend resulted in a growing tension between the Venezuelan Government and social movements, which has found expression in the Ministry of the Communes foundation. Chávez discussed this Ministry in the last public speech he made called “*Golpe de Timon*” or “Change of Direction”:

Where are the communes? Is the commune perhaps only for the Ministry of the Communes? I'm going to have to eliminate the Ministry of the Communes (...) why? Because many people believe that this ministry is responsible for the communes. And this is a very serious mistake that we are committing. (...) Let us revise it. Redact a decree which creates something like this, a superior entity for the communes. Where is it? (Frías, 2012:18-19)

There are two contradictions in the creation of the Ministry of the Communes. The first is that communes' issues should be transversal to all Ministries in government so that all ministries are involved and accountable for the communes' well-being and organisation. The presence of a Ministry of Communes results in the communes being under the oversight of government entities, resulting in the moving away from the governments' attention and accountability vis-à-vis the communes. Second, and most importantly, is the deep contradiction of having a central entity creating policies and financing the communes, diminishing the essential elements of participatory democracy and the path to self-governance. This is another source of tension between the state and the national-based social movements struggling to create a communal state.

To recap, when Hugo Chávez was elected, the Bolivarian Revolution sought to structure a participatory democracy to promote the creation of a communal state that would expand and guarantee the rights of the poor in both urban and rural areas. Social justice was promoted, and thus some improvements occurred which ameliorated the lives of the people. For example, access to universities has been much higher. Perhaps this could be related to the enthusiasm for politics in the barrios, where the dialogue about the future of the Bolivarian Revolution and socialism is more open. According to Jimenez, Spronk, and Webber (2010), these factors make people demand the continuation of participatory democracy as opposed to representative democracy. However, this also results in contradictions in the revolutionary process. These contradictions emerge in Venezuela's dire development needs, which require projects that sometimes clash with locals' interests and way of life. As demonstrated above, the Wayúu community in the Périja mountains had their struggles subverted by the central government, who kept ignoring the Bolivarian's Constitutions ideals and the right to the land of indigenous people, thus triggering the emergence of tensions between social movements and governmental elite's economic development ambitions. Near Lake Maracaibo, the social movement's struggles ended up being silenced by generous social missions funded by the capital of the exploration of energetic resources that had caused the destruction of the Lake, polluting it with duckweed.

In both scenarios, the tensions between social movements and the Bolivarian government and economic elites are clear. On the one hand, the Bolivarian Revolution inaugurated a participatory democracy that allows social movements to organise and mobilise to defend their struggles. On the other hand, however, the dire need for development and autonomy in the context of a hostile international context leads to government clashes with local social movements' interests and way of life. In these situations, both social movements and communes have been ignored and subverted to economic elite interests resulting in growing tensions and contradictions. Thus, these tensions demonstrated through the examples above result in the fragmentation of the Venezuelan historical bloc of social forces.

The ultimate fragmentation of the counter-hegemonic historical bloc at its national base gained expression within the international sphere through ALBA's institutions and principles colliding with the development plans of its member-countries national governments. Tensions and contradictions within the ALBA sphere will be explored through the analysis of development paradigms and environmental costs within IIRSA's framework.

5.3. The Environment: ALBA's Achille's Heel

The previous section discussed the tensions between national-based social movements and the Venezuelan state, including the internal contradictions these spheres of agency face. The present section considers how these tensions and contradictions expressed themselves in the context of the transnationalisation of the counter-hegemonic Bolivarian Revolution, namely in the context of ALBA member-countries. Ultimately, it aims to show how the deepening of these tensions and contradictions are an important aspect of the weakening of the ALBA project and of the counter-hegemonic movement associated with it.

A topic that seems to be in the centre of the storm is the preservation of the environment. ALBA was institutionalised with an expressed commitment to *buen vivir*, an expression of indigenous knowledge and communitarian solidarity economics in both Bolivia and Ecuador. Ultimately, it describes a harmonious relationship between humankind and nature. ALBA pledges to develop the greatest possible security and happiness in harmony with nature, social justice, and the true sovereignty of the people (Muhr, 2013: 14). However, the commitment to *buen vivir* also frequently finds itself in contradiction with the economic and social development projects expressed by the states inspired by the Bolivarian Revolution and the search for political and economic autonomy that ALBA's counter-hegemonic movement embodies.

The growing tension between these two commitments would come to find expression within ALBA. In 2006, at the World Social Forum, in Caracas, President Hugo Chávez discussed the necessity of uniting the peoples' struggles of the world by creating the Council of Social Movements.

A new offensive of the people of Latin American, in the Caribbean, in Africa, and in Asia was unleashed! Against the imperialisms of the world! Let us draw strength from our idols, from our guts (...). Let us draw our spirits and souls so that in this 21st century, united in one single struggle, people of Latin America, the Caribbean, North America, Africa, and Asia. And now, let us change the History of this century! (Mercado, 2006).

In the following year, ALBA discussed, in the 5th ALBA Summit in Tintorero, the foundation of the Council of Social Movements (CMS) with the following objectives: the continuous struggle for pluralism in harmony with the environment and with the morals of *buen vivir*, and to forge a new Homeland, decolonised, founded in multiversity, and respecting the difference of every social and cultural particularity. The CMS was to operate under the following principles: It is a space to develop common agendas; it is a sign of commitment, fully identified with the principles which direct ALBA as a process of integration; and each national chapter will define its own dynamic guidelines in harmony with their national governments (Martínez, 2013:63-67).

The CMS expresses an attempt to transnationalise the goals of participatory democracy of the Bolivarian Revolution and to fulfil the foundation of the *Patria Grande*. As mentioned by Hernan Vargas (2021), the *Patria Grande* project means to link the people's struggles through an alternative project of the non-aligned and establish a new geopolitical geometry in the world. Thus, two ideas from the Venezuelan project come to mind, which could provide clues for the probable transnationalisation of the counter-hegemonic social forces. One is Chávez's "new strategic map," which consisted in the multipolarisation of the world through an emancipatory project and the unification of the people's struggles. The other is the protagonist democracy which is given another meaning within ALBA. Thus, each member state would create a national chapter to establish and harmonise national guidelines while opening an international space, the CMS, where social movements could coordinate national chapters and unite their struggles to fulfil the *Patria Grande*.

The Manifesto written for the 1st Summit of ALBA's Council of Social Movements expresses great similarities with the Venezuelan Bolivarian Constitution, thus including and calling other states, as well the social movements of Latin America within common struggles, to unite.

What we are living in Latin America is part of a process of social reappropriation of our common destiny, of new forms of political organisation, [that is] horizontal,

direct, and participatory democracy, of a new economic system which benefits the peoples within harmonious, solidaristic and communitarian social relations of production (CMS, 2009).

In the previous chapter, the Mar del Plata Summit in 2005 was discussed as the first defeat of the neoliberal hegemony in Latin America with the alliance of a concise bloc of social forces built by Venezuela, Brazil, Argentina, and supported by social movements in the parallel event of the Summit of the Americas, *Cumbre de Los Pueblos* (Summit of the People). According to Hernan Vargas (2021), the defeat of the ALCA in Mar del Plata symbolised a new era for the social movements, representing a historical challenge to confront neoliberalism and to build an alternative, antagonistic project. This historical challenge was also an expression of changes in Venezuelan internal politics, with the advance of a participatory, direct democracy model of governance, and the gradual development of a communal state which was finding expression also at the international level:

“We (Venezuelans) do not believe in this thesis, changing the world by taking power. Because taking power is not the same as taking the government[or] about taking the government's side. We (social movements) need to take control of the different ways of power. Power is not only about political institutions but also about mobilisation, the development of the capacities to take control of the means of production, the social control of the economy, and of politics (...). These are the challenges social movements face since the creation of the ALBA project and specifically of the participation of social movements in that project” (Hernan, 2021).

The initial architecture planned for social movements coordination within ALBA was to create a Council of Social Movements, which would be divided into national chapters. In turn, the national chapters were going to be articulated within the Continental Articulation and create a more autonomous instance where social movements could unify the peoples struggles towards a true alternative and the foundation of the *Patria Grande*. The CMS was founded in Tintonero to be hierarchically equal to the Council of Ministers, which intended to keep a close dialogue with social movements and allow them to fulfil their historical role. It would also serve as a mechanism to mutually coordinate social movements within ALBA, hierarchically, as well horizontally, between national chapters (Martínez, 2013:65). Thus, according to Hernan Vargas (2021), the CMS seems to mainly be, in its initial moments, the institution that sought to acknowledge the social movement's historical role, to be at the core of the discussion of the alternative process of regional integration.

However, this institutional role was not fulfilled because only in Venezuela and Cuba were the national chapters founded. This was combined with what Hernan Vargas (2021) has described as an overall loss of common horizon in the ALBA project.

What are the tensions and contradictions that provoked ALBA's loss of common horizon? According to Hernan Vargas (2021), the role of social movements within ALBA's CMS expresses a challenge to mobilise, to resist neoliberalism, and to build an alternative through the linking of the people's struggles. However, the CMS also constitutes a challenge for the states involved in ALBA because it promotes a fundamental political role for social movements in the governance of the regional integration process. The CMS confronts states with the need to constantly manage social relations between the governmental elites and social movements. This relationship becomes increasingly harder to manage as governmental elites pursue development projects in their search for economic and political autonomy in the context of a hostile international environment that is perceived by social movements as having negative social and ecological effects. These tensions have increasingly led to a split within the historical bloc of the counter-hegemonic movement that formed ALBA, ultimately weakening the movement and ALBA itself. A clear expression of this fracture in the historical bloc of the Bolivarian Revolution is the tensions concerning the environmental costs of energy resource extraction in the region, which remains the main source of income for projects of social development in ALBA's member-states.

In Cochabamba, Bolivia, the 7th ALBA Summit took place, in 2009, where the fundamental principles of the Peoples' Trade Agreement (*Tratado de Comercio de los Pueblos* or TCP) were defined. The TCP Agreement promoted principles of solidarity, cooperation, and sovereignty in harmony with nature. It essentially celebrated the foundation of an "economic zone of shared, inter-dependent, sovereign and solidarity development, whereby the equitable distribution of wealth and the strengthening of popular, cooperative and social ownership of the means of production constitute powerful tools to ensure social justice and the progress of our societies and economic systems" (Muhr, 2013:3). The TCP agreement was to fulfil a fundamental role in the global counter-hegemonic movement, integrating a solidarity alliance with the peoples of the South in harmony with nature:

Human beings are part of an interdependent system of plants, animals, forests, oceans, and airs with whom they must live in harmony and equilibrium, respecting the rights of us all. To guarantee the rights of human beings, we must recognise and defend the rights of Mother Earth (ALBA-TCP, 2009).

From 2007, Cuba and Venezuela's efforts to assist other nations in health and education sectors have managed to eclipse US assistance in the region. However, this assistance was possible through the funding of the oil industry from Venezuela. Oil money enlarged state-owned companies, such as the Petroleum of Venezuela (PdVS), and Chávez showed signs that more nationalisations would follow by nationalising electricity companies and other productive sectors to boost the economy (Kozloff, 2008:141-142). According to Kozloff (2008: 142), oil money gave rise to a bloated state bureaucracy, and most people have gotten accustomed to requesting the state to resolve their communities' issues. This came into increasing contradiction with the Bolivarian Revolution ambition of promoting community-based, autonomous solutions. Thus, Kozloff affirms that Venezuela is still very centralised, and the furthest away from Venezuela's capital, Caracas, the fewer benefits people receive from the Revolution because the system might have made them apathetic.

Nikolas Kozloff (2007) has referred to Hugo Chávez as an "environmental hypocrite." The former President of Venezuela denounced the consumerist lifestyle in the United States and joined together with the ALBA member countries to defy the Copenhagen Agreement (COP-16):

The environmental crisis as a result of the increased temperatures of the atmosphere is a consequence of the capitalist system, of the prolonged and unsustainable pattern of production and consumption of the developed countries, the application, and imposition of an absolutely predatory model of development on the rest of the world and a lack of political will (ALBA, 2009)

Although Venezuela continues to be a major world oil producer, the country only emits 0.49% of the world's greenhouse gases occupying fourth place in Latin America regarding greenhouse emissions, after Brazil, Mexico, and Argentina (Worldometer, 2021). Nevertheless, Venezuela is also a major oil exporter, which contributes to global warming. Additionally, Venezuela, Bolivia, and Brazil, ALBA-member countries, support development projects such as the South America Regional Infrastructure Integration Initiative (IIRSA). IIRSA is a regional integration project which aims to synchronise strategic infrastructure works towards the facilitation of natural resource development. According to Kozloff (2010), IIRSA, from a social and environmental standpoint, is a complete nightmare that could destroy much of the Amazon rainforest and, consequently, accelerate and aggravate climate change.

IIRSA was founded by Latin American political leaders of neoliberal affiliation from Brazil, Colombia, and Argentina in 2000. In December 2004 in Cuzco, Peru, upon the foundation of the Union of South American Nations (UNASUR), twelve participant Presidents, including the

leaders in Ecuador, Bolivia, and Venezuela (ALBA member countries), confirmed their commitment to the IIRSA initiative. IIRSA was an initiative determined by the Washington Consensus and outlined an open regionalism agenda that recommends deregulation of the economy and liberalisation of foreign trade in Latin American countries (Cardoso-Castro & Ravena, 2020). IIRSA's declared goals are:

To promote the development of the regional infrastructure within a framework of increasing competitiveness and sustainability, [to achieve] efficient and equitable development patterns in the region (...) and promote physical integration at the continental level (Cardoso-Castro & Ravena, 2020).

IIRSA executes regional integration based on "hubs." Four of these hubs comprehend the Amazon Region integrating infrastructure projects from the following countries: Bolivia, Brazil, Colombia, Ecuador, Guyana, Peru, Suriname, and Venezuela (Cardoso-Castro & Ravena, 2020). According to Cardoso-Castro & Ravena (2020), the Amazon territory, transversal between Peru, Brazil, and Bolivia, concentrated projects related to ports and waterways, roads, seaports, air transportation, and border crossing, electrical and hydroelectrical power plants. From these projects, the countries involved would enable the restoration of state power and facilitate the implementation of development policies. Furthermore, competition would be promoted, which would allow domestic firms to seize global economies of scale. Concerning technology, these projects would support innovation policies and an active trade policy targeted at strong intellectual property regimes and investment opportunities for domestic firms (Cardoso-Castro & Ravena, 2020). However, the question remains, at what cost?

In 2004, when ALBA was created, Pink Tide leaders advocated for sustainable development. ALBA's *buen vivir* is proof of that promise, combining development policies while considering social and environmental issues. However, IIRSA development projects reveal a clear lack of environmental regulation. According to Cardoso-Castro and Ravena (2020), only 50% per cent of the action in the Amazon region between 2013 and 2014 had environmental licenses⁴. As for social and environmental impacts, original communities which are protected by national constitutions, such as those of Venezuela, Bolivia, and Ecuador, responsible for protecting the forest, were submitted to the loss of their autonomy and to displacement.

⁴ An environmental license is a supervision tool by which an environmental agency legislates and approves the location, installation and operation of activities that may generate any pollution or environmental degradation (Environmental Licensing, 2016).

Thus, IIRSA's overall plan for the Amazon region was the generalisation of a shared approach to environmental legislation to facilitate integration from a supranational perspective while ignoring international commitments for the protection of the rainforest and its global environmental importance.

In IIRSA's framework, a team of technical experts from Venezuela, Brazil, and Argentina designed a planning route, calculated costs, financing, and production of supplies to construct a new pipeline across Venezuela's Guayana region and the Amazon jungle. Inclusively, the Russian firm Gazprom had expressed interest in what was considered "the most ambitious physical infrastructure initiative in South America" (Marquez, 2006). The project was the source of much controversy, alarming environmentalists from the "Red Alerta Petrolera-Orinoco Oilwash" who expressed concern about the Amazon rainforest and the home of indigenous cultures. This network of environmentalists explained that in this situation, the IIRSA project describes an offer of energy extraction that is cleaner than oil; however, there are risks of major spilling in a region where the pipeline would be vulnerable to natural disasters and sabotage, which could cause damages to the environment and to local communities. Thus, in the present project context, the risk of the operation contributes as much to global warming, deforestation, and indigenous communities' displacement as oil would.

Jorge Montiel, from the Wayúu community, expresses great concern towards IIRSA's project, which is also at the origin of Corpolutia's plan for the expansion of coal extraction in the Zulia state:

Why has the government only talked about the FTAA when the IIRSA is now the greatest monster? (...) We cannot let IIRSA remain under a low profile. It has a number of projects located all over South America, and many of those are major infrastructure projects (Montiel, 2010:215).

The main argument is that the economic elites' and governments' agendas and the social movements started to clash. On the one hand, the ALBA member states are under enormous pressure to develop economically, industrialise, become autonomous regarding energy resources, and be autonomous from international donors. Additionally, developing is the only way these states have to reduce poverty, one of the main goals of the Bolivarian Revolution. Concomitantly, these countries' social strata and social movements depend on their governments to promote their struggles and provide their wellbeing. On the other hand, economic and technological development, especially based on resource exploration models, usually have great environmental costs, which causes tensions between ALBA member countries' governments and the CMS' social movements struggles.

As mentioned earlier, ALBA sought to present an alternative framework to address environmental issues with the ultimate objective of respecting the principles of *buen vivir* and the protection of Mother Earth. In terms of ALBA's narrative, it aims to defend the oppressed and the vulnerable, like the indigenous communities, expressing concern for the young people who represent the future of humanity. Another of ALBA's approaches is the emphasis on procedural justice, thus, promoting fairness, inclusivity, and transparency through development (Watts & Depledge, 2018). However, despite this rhetoric, ALBA member states continue to rely on hydrocarbons' revenues for social missions and development promotion while stripping communities from meaningful participation in environmental policies (Cutler & Brien, 2013:227). On the one hand, Venezuela has been accused of shutting out NGOs from domestic environmental policymaking and suppressing dissent and national social movement's protests. On the other hand, protected areas in Bolivia and Ecuador are getting explored for gas and oil even against the resistance of original, indigenous people, mostly in the context of IIRSA initiatives (Watts & Depledge, 2018). Thus, as this section has discussed, there is a clear tension between environmental justice and the current ALBA-TCP energy integration project. The environmental issue can also demonstrate how ALBA has been failing to act as a concise counter-hegemonic bloc. This is further evident in the relationship between the state agency and ALBA's Council of Social Movements (Cutler & Brien, 2013:220).

The People's World Conference on Climate Change and the Rights of Mother Earth was held in Bolivia to demonstrate resistance to the 2010 United Nations Climate Change Conference (COP-16), where ALBA's issue on hydrocarbon exploration was finally acknowledged by the Council of Social Movements:

Oil has been our fundamental tool in the search for social justice and the peoples' unity; however, we know it is not a sustainable way, and as united peoples, we have to look for other ways to support ourselves (ALBA-TCP/CMS Caracas, 2010).

In 2010, The People's World Conference was held in Cochabamba, Bolivia, where an estimated thirty thousand people from 135 countries gathered, including the presence of NGOs and social organisations, to attribute the "historical responsibility" of climate change on developed countries (Watts & Depledge, 2018). The conference placed the rights of Mother Earth and the principles of *buen vivir* at the centre of governance and climate justice. Objectively, it promoted proposals to fund the non-extractive industry of fossil fuels, protect indigenous communities' rights and oppose market-based environmental governance (Zimmerer, 2015). Thus, the People's Conference came to represent a counter-hegemonic conference on climate change,

facing the Cop-16 as its alternative, clashing capitalist expansion with the principles of *buen vivir*.

In support of the “People’s Agreement,” the arrangement that was celebrated after the Conference of Cochabamba, ALBA countries mobilised and met with the CMS, social movements, and governments across the world in the 10th ALBA Summit to pressure the decisions of the United Nations Climate Change Conference (COP-16). According to Cutler & Brien (2013:220), “this conference is an example of coordinated social movement demands attempting to influence the international processes of climate negotiations.” The Bolivian government promoted the mobilisation of social movements to defend the proposals of the People’s World Conference, which was complemented with ALBA’s denunciation of the Kyoto protocol stating that “ALBA decisions cannot be bought if it means the destruction of humankind” (Cutler & Brien, 2013:226). However, despite the efforts, Bolivia was the only nation that remained true to the rhetoric and did not sign the Cancún Accord that came out of COP-16. This expresses the growing difficulties of ALBA in presenting itself as a concise regional counter-hegemonic bloc (Cutler & Brien, 2013:225-226).

Bolivia’s commitment to the positions of the World’s Peoples Conference was also infused with contradictions if the relations between the Bolivian government and indigenous communities within the country were considered. According to Zimmerer (2015), protesters in Bolivia, who sought to draw attention to the impacts of state or corporate-led resource extraction and the resulting destruction of indigenous communities’ livelihoods, sustainability prospects, and water resources, were silenced and marginalised by government forces during the conference. This issue is also highlighted by Cutler & Brien (2013:226-229), who understand that these original communities aim for regional, global transformation towards a development paradigm that does not rely on the exploitation of natural resources.

The People’s Conference expressed the growing tension between social movements and ALBA’s national governments. During the conference, the National Council of Ayllus and Markas of Qullasuyu, a Bolivian indigenous council, highlighted the tensions between the Bolivian National Government and Bolivian social movements reflecting on the COP-16 turn of events:

What we saw again in Copenhagen is that externally our President is the defender of Mother Earth, of nature, but internally he is doing the opposite (...) They are trying to hide these internal contradictions (...) (Building Bridges, 2010:35).

As a response to this accusation, the Bolivian government accused the National Council of being funded by right-wing interests. Following these accusations, several protests erupted in

defence of the National Council, frustrated by the Bolivian government's concessions to private foreign companies for the extraction of natural resources, resulting in the contamination of water resources and deforestation. Most importantly, this issue highlights how the government's pursuit of an economic development agenda is increasingly clashing with the protection of indigenous territories and even their constitutional right to previous consultation (Cutler & Brien, 2015:228). However, the Bolivian government also needs to answer to international donors to whom it could become unpopular if the *Movimiento Alternativo Socialista* (MAS) agenda were to be carried out. This is another example of international pressure, which could help explain why the government keeps alienating social movements.

Thus, while ALBA member states consider social movements an ally and an integral part of the counter-hegemonic historical bloc that seeks to challenge neoliberal hegemony in the region, both internally and internationally, there are growing signs of contradictions and tensions between the agendas of sovereign economic development and poverty alleviation, on the one hand, and environmental protection on the other. The fact that ALBA member states depend for the funding of their social missions and sovereign economic development, mainly on the revenues deriving from the exploration of hydrocarbon and energy resource extractions, deepens a growing contradiction between ALBA member states search for autonomous development and environmental protection. This contradiction is increasingly compromising the cohesion of the counter-hegemonic bloc at both the national and international levels, as tensions arise between the immediate interests of social movements and governmental elites.

This increasing tension between the Bolivarian government and national-based social movements expresses itself domestically and internationally, namely in the context of ALBA. The tendency for such a fracture in the counter-hegemonic historical bloc that finds international institutional expression in ALBA threatens its overall project, since the "ALBA project is [meant] not just as an alliance between the seven countries or governments, [but], it is about the ALBA as an alternative to the neoliberal proposal, a new political project" (Hernan, 2021).

Increasingly, ALBA's main challenge has become how to couple the promotion of participatory democracy and the central role of social movements in the counter-hegemonic movement with the need for sovereign development (Cutler & Brien, 2013: 229-231).

From the analysis in this chapter, it appears ALBA and its member states are having increasing difficulty in adequately answering this challenge. As explored in the first section, the process of 21st century socialism's transition to a communal state appears to be failing because of the

continued dependence of Bolivarian states on a development model based on an oil rentier economy, which lies at the core of a progressive uncoupling between social movements and governmental elites, in ways that are fracturing the historical bloc that led the Bolivarian Revolution.

This fracture is expressed in the international sphere, as Venezuela, Brazil, and Bolivia increasingly have adopted policies that directly contradict ALBA's principles of *buen vivir*, of development in harmony with nature. Venezuela has been financing ALBA and its social missions with revenues from the exploration of hydrocarbon fuels and, although promoting the production and exploration of alternative fuels, environmental disasters like Lake Maracaibo, and especially the deforestations caused by coal mining, left indigenous communities in a very vulnerable situation showing there is a clear contradiction between national interests and ALBA principles. Within these contradictions, the role of Bolivarian states, as an intermediary between the demands of social movements, the goals of sovereign regional development, and the pressures of the global international system, has become increasingly challenging, as expressed in the contradictions of the positions adopted by representatives of these states at both COP-16 and the Peoples' World Conference.

Finding a path in dealing with this challenge is fundamental for the future of the counter-hegemonic movement that ALBA embodies. Failing to do so will have, as a result, the loss of common horizon.

CONCLUSIONS

The last chapter of the present dissertation discussed the tensions and contradictions that are becoming more accentuated between the three spheres of agency under consideration, the nation-states, social movements, and ALBA, within a transversal theme, environmental protection, and the continuous exploration of energetic resources as the means for economic development. These contradictions have been argued to have destabilised the cohesion of the historical bloc leading the counter-hegemonic movement against neoliberalism in Latin America. However, there is one other sphere of agency that has yet to be explored, the global sphere, which represents the neoliberal supremacy and its effects weighing on the Latin American counter-hegemonic movements. This sphere is expressed in the pressures of neoliberal supremacy over Latin American countries to develop within the neoliberal economic framework that aims to open markets and facilitate trade, supported by a representative democratic system. These pressures originate a hostile international environment vis-à-vis the ALBA member states who are attempting to guarantee autonomy and develop their sovereignty. Examples of this have been given exploring the IIRSA development hubs, arguing that ALBA member countries kept alienating social movements from communities who were being affected by the environmental costs of development projects promoting infrastructures oriented towards the extraction of energetic resources, which would cause great environmental damage and the displacement of populations. Thus, IIRSA is an example of how ALBA member countries' national interests clash with *buen vivir*'s principles.

The present study demonstrated that, even though the social forces were able to rearrange the Venezuelan states' configurations, in the international, transnational sphere, neoliberal supremacy is still thriving. If the historical bloc of social forces fails to further transnationalise, the counter-hegemonic movements will lose the strength and flexibility to act as tensions and contradictions deepen. However, the transnationalisation process itself is challenging and can reinforce the contradictions that were identified in the national historical bloc leading the counter-hegemonic movement in Latin America.

As mentioned in the theoretical chapter of the present dissertation, "changing world order begins with the long, laborious effort to build new historic blocs within national boundaries" (Cox, 1993: 65).

However, the contradictions from the national counter-hegemonic historical bloc start to gain expression in the transnational counter-hegemonic movement. The tensions between

Venezuela's social movements and the economic and governmental elites start to become expressed also within ALBA's organs and principles. This study demonstrated these contradictions through an analysis of developmental policies which had environmental costs on communities that were ultimately stripped of the autonomy consecrated by the Bolivarian Constitution. In ALBA's framework, despite supporting an alternative development paradigm based on *buen vivir's* principles, ALBA member countries pressured to develop and to fund social missions, integrated within IIRSA, a program for infrastructure integration which has heavy social and environmental costs. Similar to Venezuela, ALBA member countries ultimately alienated social movements and ignored their contestations. Expression of the increase of tensions was the COP-16 in Cancún, where ALBA could not act as a bloc towards environmental action, presenting the weakening of ALBA's transnational counter-hegemonic movement.

As discussed in Chapter II, Cox (1987) mapped social relations and historical roles on the renovation of the world order to study the potentials for structural change and the development of alternative, counter-hegemonic historical blocs. Thus, the world order and its renovation towards an alternative system are grounded, according to Robert Cox (1993:64) in social relations. The fundamental changes and the structuring of a new counter-hegemonic historic bloc can be traced in social relations and in national structures. These transformations are ultimately achieved through a long-term war of position, implicating an active construction of a counter-hegemonic movement within a hegemonic society. The war of position is carried out by organic intellectuals in constant interaction with the groups who are dissenting from the established order and resisting the concessions of the operative hegemony.

The present study has agreed with Cox's theoretical work in which the national context remains the only place where historical blocs can be founded. However, it remains true that the world economic and political frameworks are very relevant in influencing the prospects for such counter-hegemonic initiatives.

The Bolivarian Revolution and the 21st century socialism phenomena in Venezuela constituted the foundation for the construction of a counter-hegemonic historic bloc through a long-term war of position. The prolonged economic crisis in the 1980s, which ultimately provoked the *Caracazo* episode, was a symptom of the failed attempt to impose a neoliberal system in the country. After Hugo Chávez's failed coup d'état in 1992, he announced, after coming out of prison, that he was going to win the presidential election in the year 1998. When analysing the prospect of the emergence of counter-hegemonic blocs, Cox predicts that "varieties of populism could provide a more likely form of revolutionary consciousness than class identity."

According to Michelutti (2013: 183), Chávez's charisma and discourse offered the people a comprehensive view of the world to shape the collective consciousness. This was translated into the identification of sovereignty of the people and a direct democratic system that aimed to include "invisible," unrepresented people, like the indigenous communities and the population living in the *barrios*.

This study highlighted how the Bolivarian Revolution could be interpreted as a long-term, active interaction of organic intellectuals with popular, unrepresented social strata called to be included in the counter-hegemonic movement. Thus, as demonstrated in the previous chapters, Chávez's Bolivarian regime and the revolutionary process represented a restructuring of social forces and the construction of a counter-hegemonic historic bloc within Venezuela through the process of a long-term war of position that culminated in the approval of the Bolivarian Constitution. This historical mark represented the consolidation of the new states' configuration in the image of the counter-hegemonic social forces. This task implied the active revision of governmental practices, state apparatuses, and institutions of civil society, including the relation between state and civil society. Thus, by constructing a counter-hegemonic historical bloc in Venezuela, there was an attempt to radically reform existing hegemonic institutions replacing them with counter-hegemonic ones (Muhr, 2008b).

Hugo Chávez's 'new strategic map' announced the beginning of the second phase of the Bolivarian Revolution, which consisted in the conceptualisation of a multipolar world and the planning of a Bolivarian foreign policy (McCarthy-Jones, 2015:47-68). This consisted of a revisionist attitude towards the Washington Consensus and the neoliberal supremacy which still ruled in the international system. Thus, it was crucial that the Bolivarian new foreign policy would attempt to solidify Venezuela's sovereignty through an international strategy which ultimately promoted ALBA, a regional project consisting of an alternative to the Washington Consensus-led integration and development paradigms.

Recollecting the debate between William I Robinson (2005, 2006) and Stephen Gill (1993, 2008, 2014), the process of class transnationalisation is contested between these two authors. On the one hand, Robinson considers that Neo-Gramscian frameworks need to step away from state-centric interpretations whose role is providing the means to enforce and reproduce class relations and practices. Thus, social classes are the primary historical agents. On the other hand, Stephen Gill argues that the emergent transnational social forces have a geographical centre, the United States. New Constitutionalism is a state-centric project which recognises the newly gained mobility of capital and attempts to make transnational neoliberalism the sole model for future development. In Chapter IV, a clear example of New Constitutionalism's mechanisms

was demonstrated to explain how the rule of law can be reinforced to achieve further neoliberalisation.

In this framework, what is ALBA? Recalling Chapter I, ALBA is a regional institution that emerged in the 4th wave of regionalisation in the Latin American regionalisation framework. This wave corresponded to a period when several left political leaders were democratically elected, which inaugurated the “Pink Tide” and is distinguished by the favouring of a political agenda that contrasts with the neoliberalisation of the previous waves. To study ALBA, the present dissertation sought to understand the differences between the old regionalism framework and the new regionalism approach (NRA). Hettne and Söderbaum (2000) developed the concept of *regionness*, which seeks to understand the binding relations between several dimensions, to act according to core values such as the protection of the environment, and to wain globalisation impacts in defence of civil society. This concept is particularly relevant when studying ALBA because, according to Muhr (2008b), this regional space is defined by Latin American and Caribbean peoples’ shared historical and cultural roots as well their common struggles, one of them being development according to the principles of *buen vivir*. Thus, ALBA can be identified as an attempt to resist neoliberal globalisation’s negative effects through the creation of an institutional space of which an international counter-hegemonic bloc was created in Venezuela, transmitted to the international dimension through a sense of *regionness* to guarantee its survival.

The present study has demonstrated that ALBA is an expression of the attempt to develop an institution to represent the outward expansion of the Bolivarian historical bloc of social forces and, essentially, a counter-hegemonic bloc. The Bolivarian Venezuela’s new strategic map called upon the participation of Latin American people through social movements in the creation of a new democratic system, both domestically, within the territory of each state, and internationally, via ALBA, where social movements were supposed to have a voice via the Council of Social Movements. ALBA was thus created with these objectives in mind, on the one hand, to connect the people’s struggles in the region and, on the other hand, to promote the sovereign and sustainable development of its members. However, while the initial architecture planned for the organisation implied the coordination of social movements at the international level, namely via the national chapters and the Continental Articulation, these plans have faced increasing blockages, mainly attributed to lack of political will on the part of ALBA member states.

What does ALBA evolution tell us about the challenges faced by counter-hegemonic movements and the extent to each the organisation itself represents a successful counter-

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hegemonic movement in the region? In Chapter 5, the tensions and contradictions within the counter-hegemonic bloc, and the way these found expression both in ALBA and in Venezuela and Bolivia, were discussed. Within the national Venezuelan framework, there are clear tensions between the communes and social movements struggle for autonomy for the ultimate objective of founding a communal state and the political elites who are predominantly focused on ensuring economic development and sovereign independence in the context of a hostile international environment via a predominantly extractive economy. It was also demonstrated that the struggle for the protection of the environment is a clear example of these contradictions. Retaking Venezuela as a key example, on the one hand, Hugo Chávez allocated hydrocarbon's income to finance social missions towards the reduction of poverty. But, on the other hand, the privileging of an extractive economy as the main path of sovereign development has been associated with environmental disasters that provoked the increasing opposition of social movements. The COP-16 in Cancún proved that these countries are unable to act as a concise bloc for the protection of the environment and the promotion of ALBA's ideals.

According to Robert Cox (1993), hegemonies are founded by powerful states that have undergone a revolution, configurating the state in the social forces' image in political and economic structures. This process releases "energy," which overflows beyond states' boundaries, expressing itself in culture, technology, social and economic institutions. The hegemonic international system will express hegemony by embodying the rules which facilitate the expansion of the hegemonic world order, ideologically legitimating the norms of the world order, which ultimately absorbs any counter-hegemonic idea. Thus, an expansive hegemony will impinge its patterns and configurations to countries that have not undergone the same process of revolution and historical bloc foundation and continuously try to accommodate the hegemonic power structures. In Venezuela's case, ALBA was not able to become an institution that was able to be the vessel in which national-based social forces overflow the international system. Furthermore, Stephen Gill's new constitutionalism approach presents an analysis of the international rule of law and how this is engaged to further impose hegemonic structures, facilitating the neoliberal forms of globalisation. In the unlikelihood of forming a hegemonic world order, Gill understood that the legitimisation of a system's rule is exercised through supremacy. ALBA was unable to materialise supremacy in the effort to legitimise its rule of law so that the Venezuelan mode of production if it managed to guarantee technological sovereignty and poverty eradication, is supported by other countries. Ultimately, the hegemonic structure provoked the deepening of tensions and contradictions, which further waned the social movements' enthusiasm and challenged the development of the

counter-hegemonic movement, snuffing its agency and intensity. The challenge is visible, for example, in the non-fulfilment of ALBA's initial architecture as well as in the incapacity of its member states acting together as a concise counter-hegemonic force in matters related to climate change and environmental protection.

These developments appear to confirm Martínez's hypothesis concerning ALBA's counter-hegemonic double turn. According to this author, while social movements were working for ALBA in the CMS' initial moments, subsequently, social movements sought to autonomise and organise away from state agency. However, it is known from a direct testimonial (Hernan 2021) that the initial architecture planned for the organisation of social movements was not fulfilled on the part of most ALBA members. National chapters were only founded in Cuba and Venezuela and, when it comes to other ALBA member states, there were none to be seen. Thomas Muhr (2008b, 2012) has done research on the revolutionary experience in Central American nation-states, namely El Salvador and Nicaragua, who failed to transnationalise their movements, which ultimately was seen as one of the main reasons for the weakening of their revolutionary struggles. Because even if at one moment a concise counter-hegemonic historical bloc is founded and it is able to modify the state's internal configuration, the hegemonic arrangements in the international and transnational levels remain. Without transnationalisation, such counter-hegemonic movements remain locked in state borders and are easily strangled by the prevailing hegemonic international order.

When the counter-hegemonic historical bloc had consolidated in Venezuela, ALBA became the vehicle for transnationalisation. This was partially successful, for a while, but the accumulation of tensions and contractions between the various elements of the Bolivarian counter-hegemonic historical bloc, with the particular highlight for the tensions between nation-based social movements and governmental elites, namely in countries such as Venezuela and Bolivia, has waned the cohesion of this historical bloc and of ALBA's capacity to struggle in the international stage through an active transnational war of position against the hegemonic neoliberal order in the region.

Recollecting the main question informing this study, to which the present dissertation attempted to answer: To what extent did ALBA constitute a counter-hegemonic regional project in a global neoliberal hegemony context?

According to Dabène (2012), the 4th wave of regionalisation in Latin America was characterised by the co-existence of two or more models of regionalism, thus expressing an absence of a unique and hegemonic narrative for regional integration (Briceño-Ruiz, 2018).

ALBA is an example of a counter-hegemonic regional integration project, as described in Chapter I, while institutions such as the Pacific Alliance constitutes an open regionalism model of integration. According to Briceño-Ruiz (2018), both CELAC and UNASUR were created to counter ALBA's revolutionary goals.

Thus, regarding counter-hegemonic movements, within the fourth wave of regionalisation, ALBA constitutes the most advanced counter-hegemonic movement that was ever formed in the region. ALBA became an expression of the Venezuelan national historical bloc, which reached a regional, transnational dimension, overflowing beyond the national state's borders. Furthermore, the ALBA's initial momentum was able to impinge defeats to the neoliberal supremacy expressed in the failure of the ALCA initiative in the Mar del Plata Summit, 2005. However, the international dimension remains ruled by neoliberal supremacy, which keeps pressuring Latin American states to develop according to neoliberal economic and democratic models. Due to this hostile international environment, the transnationalised counter-hegemonic bloc of social forces expressed through ALBA finds itself in a fragile situation, as tensions and contradictions grow between social movements and ALBA's national governments and elites. ALBA, the expression of the transnationalisation of the Venezuelan counter-hegemonic movement, needs to deal with the contradictions that were demonstrated above; otherwise, the hopes of its survival are very slim. This is because the growing tensions translate into the fragmentation of the counter-hegemonic historical bloc, which gathers both social movements and governmental elites who sustain the counter-hegemonic movement and, ultimately, its future.

The present study demonstrated some challenges the national-based counter-hegemonic bloc faced in its development and transnationalisation process facing the pressures of the neoliberal supremacy in the international dimension. For future investigation, it would be interesting to investigate the fourth dimension further, the international sphere, interacting with other national-based counter-hegemonic movements, for continuous attention on national-based counter-hegemonic movements struggling to transnationalise.

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