

# **Asian Journal of Latin American Studies**

Vol. 36 No. 2

라틴아메리카연구

Latin American Studies Association of Korea

한국라틴아메리카학회

2023



# Asian Journal of Latin American Studies

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## Venezuela's South-South Cooperation at the regional level during Hugo Chavez's Government

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### ABSTRACT

**Venezuela's South-South Cooperation at the regional level during Hugo Chavez's Government:** During the first and part of the second decade of the 21st century, Venezuela was an active promoter of South-South Cooperation in Latin America, primarily through ALBA-TCP, PetroCaribe, UNASUR, and CELAC. Each of these organizations was linked to an identity and a form of relationship to promote Venezuela's interests. ALBA-TCP and PetroCaribe were Venezuela's main organizations for promoting regional cooperation since it was the principal member and the country with more economic and political strength among the participants. Venezuela was also an active member of UNASUR and CELAC. The country used these organizations to achieve integration, decrease the U.S. influence in the region, and promote a multipolar world. This paper assesses the scope and perceptions of Venezuela's cooperation by analyzing ALBA-TCP, PetroCaribe, UNASUR, and CELAC as a part of a comprehensive foreign policy. The findings are the result of descriptive and explicative research with documentary and fieldwork design. The outcomes show that the cooperation established through these initiatives generated tangible benefits in the member states, generating a positive perception in partner countries. However, in countries that prioritized their relationship with the U.S. and were not aligned with the model promoted by left-oriented leaders, Venezuela's cooperation had a negative perception.

**Keywords:** Venezuela, ALBA-TCP, PetroCaribe, UNASUR, CELAC

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## INTRODUCTION

South-South Cooperation's (SSC) definition and conceptual delimitation are controversial aspects usually discussed in international forums without any existing definitions completely fulfilling the aspirations of the involved actors. Brun (2018) pointed out that "government actors, as well as international organizations and academics, issue their proposals without reaching an agreement within each group" (p.173).

Currently, the UN defines it as a broad framework of collaboration among countries of the South in the political, economic, social, cultural, environmental, and technical domains. Involving two or more developing countries, it can take place on a bilateral, regional, or interregional basis. (UNOSSC, 2021).

Likewise, a recent study carried out by the author regarding politics of SSC in Venezuela defined this cooperation modality as:

Cooperation among countries of the Global South aimed to improve the quality of life of their population, reinforce the role of developing and least developed countries in the international system, and achieve sustainable development. This type of cooperation encompasses modalities beyond economic cooperation, including political, cultural, social, environmental, and technical cooperation (Zavarce, 2023, p.37).

The study of SSC has been regaining interest in states, policymakers, academics, and other stakeholders since the beginning of the century due to the recent economic and diplomatic achievements of several key countries of the Global South, especially the BRICS group.

In the Latin American and Caribbean (LAC) region, China's foreign aid raised from 5% to 20% of its total budget from 1990 to 2016 (Maggiorelli, 2017). Moreover, Dollar (2017) highlighted that "the \$106 billion that China has already invested in LAC is significant, and the cooperation initiatives are certain to grow substantially in upcoming years" (p.3).

China's engagement with the region has been nurtured in the last decade

with the CELAC platform. This multilateral framework represented a significant development to reinforce cooperation between China and LAC (McKelvey, 2014).

Brazil, another member of the BRICS and the largest LAC nation, has been promoting SSC seeking regional leadership and shaping extra-regional alliances for its economic interests (Santander & Alonso, 2018). In this direction, this country has proactively participated in regional organizations such as the Initiative for the Integration of the Regional Infrastructure of South America (IIRSA), the Union of South American Nations (UNASUR), the Community of Latin American and Caribbean States (CELAC), the Southern Common Market (MERCOSUR), The Amazon Cooperation Treaty Organization, among others.

In this context, Venezuela has been a historical advocate and provider of SSC. Moreover, during the first and part of the second decade of the 21st century, the country had various initiatives directed at regional and extra-regional partners. These initiatives ranged from oil supply and economic cooperation with Caribbean partners, security cooperation with South American countries, and political concertation in Latin America to educational exchanges and infrastructure building to African countries, as well as cultural and commercial exchanges with China and other Asian nations.

Despite the increment in political ties and cooperation between Venezuela and countries of the Global South, the focus remained in LAC. Venezuela subscribed more than 5.000 cooperation agreements from 1999 to 2013, which were majorly channeled through regional organizations such as the Bolivarian Alliance for the Peoples of our America (ALBA-TCP), PetroCaribe, UNASUR, and CELAC.

Through each of these initiatives, a total of 33 states were, to different degrees, participants in SSC, a situation that can be interpreted as support for this modality of international cooperation.

At this point, it is necessary to mention that previous studies on Venezuela's

SSC have mainly focused on specific and individual initiatives<sup>1</sup>, such as ALBA-TCP and UNASUR, rather than analyzing all of them as part of a comprehensive foreign policy. In addition, the focus has been centered on understanding these initiatives through the perspective of a new wave of regionalism<sup>2</sup> in LAC and not as a part of SSC policies promoted by a State, in this case, Venezuela, with the support and coordination with other states of the region.

Moreover, the few studies<sup>3</sup> focusing on Venezuela's SSC from the perspective of foreign policy usually relied only on secondary sources for their analysis rather than the vision of the policymakers of the study period and the perception of other sectors critics of the government.

Given this context, this paper aims to answer the following questions:

1. What was the scope of Venezuela's South-South cooperation initiatives during Hugo Chavez's presidency?
2. What was the perception generated by Venezuela's South-South cooperation through the region?

Since this paper intends to assess the scope and perception of Venezuela's SSC and not to provide a complete understanding of the efficacy of Venezuela's foreign policy or its internal public opinion, the author executed descriptive and explicative research with a documentary and fieldwork design. In the documentary stage, the author reviewed the information available in repositories of international organizations as well as academic works specialized in Latin American cooperation, especially those promoted by

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1 For example, Muhr (2013) and Cusack (2019) examined ALBA-TCP, Cederlöf and Kingsbury (2019), and Jardon, Kuik, and Tol. (2019) researched about PetroCaribe, Llenderroza (2015) and Mijares and Nolte (2018) investigated UNASUR, and Bonilla and Jaramillo (2014) explored CELAC.

2 For more information, consult Rocha (2015), Beaton and Kennedy (2016), Aceves and Lo Brutto (2016), among others.

3 For more information, consult Romero (2010), Benzi and Zapata (2013), and Santander and Alonso (2018).

Venezuela.

Subsequently, the author carried out fieldwork based on in-depth interviews to obtain information about the various practices and visions of Venezuela's SSC initiatives. The interviews were conducted with high-ranking officials of the Venezuelan government involved in the SSC's policy-making process and other sectors of the civil society critics of the government.

Following the postulates of Corbin and Strauss (1990) and Glaser (2002) regarding qualitative research, the researcher put emphasis on the reviewed authors and key informants' quality, expertise, and credibility in the topic rather than the number of samples.

The contents are divided into eight sections as follows: 1) The overview of Venezuela's SSC in the framework of the Bolivarian Diplomacy 2) The relationship between Venezuela and the closest politically allied nations (ALBA-TCP); 3) The relationship between Venezuela and the Caribbean (PetroCaribe); 4) The relationship between Venezuela and South American nations (UNASUR); 5) The relationship between Venezuela and the Community of Latin American and Caribbean States (CELAC); 6) Venezuela's government evaluation of these initiatives 7) Perceptions of partner countries and other regional actors, and 8) conclusions.

## **The overview of Venezuela's South-South Cooperation in the framework of the Bolivarian Diplomacy**

Since the beginning of its democratic history (1958), Venezuela has been a traditional contributor to SSC modalities. Venezuela is a founding member of the OPEC and the G77; the country was one of the main advocates for a NIEO, and joined the NAM in 1989 (Romero, 2002; Dominguez, 2015). At the regional level, Venezuela was a founder member of the Andean Pact, the Latin America Integration Association, and since 1980 a reliable oil provider to Central America and Caribbean countries through the San

Jose Agreement (Lander, 2006; Romero & Curiel, 2009).

However, from 1999, the Chavez administration promoted a more proactive foreign policy aiming to break with some of the orientations of previous governments, among those, engaging in North-South Cooperation initiatives. This foreign policy translated into a cooperation model characterized by the predominance of the political agenda, highlighting its multipolar rhetoric, distance from technocratic and apolitical approaches promoted by traditional donors, aiming for regional integration, and reliance on the oil sector (Ojeda, 2010; Sanahuja & Cienfuegos, 2010).

A review of official documents and speeches of Hugo Chávez as head of State allows us to affirm that, on the one hand, the altruistic discourse of the SSC relied on shared identities and values due to similar challenges, friendship, solidarity, and common history.

Nevertheless, on the other hand, the government also openly promoted policies related to consolidating regional leadership, establishing strategic alliances, prestige, influence, or desire for recognition (Rodríguez, 2013).

In this sense, Venezuela attempted to contribute to regional development by providing natural and financial resources, aiming at generating social improvements in LAC countries; but also projecting soft power, focusing on political interests against the developmental paradigms supported by the IMF, the World Bank, and the OECD and trying to diminish U.S. influence in regional affairs.

It is necessary to note that the core of Venezuela's financing was directed to left-wing oriented governments, such as Bolivia, Cuba, Ecuador, Haiti, Honduras, Nicaragua, and Saint Vincent and the Grenadines. However, other SSC initiatives were promoted with regional allies of the U.S., such as Colombia and Guyana, through UNASUR, CELAC, and PetroCaribe.

Different UN-ECOSOC estimations between 1999 and 2009 affirmed that Venezuela would have transferred resources to its regional partners with different degrees of concessionality, amounting to \$36.4 billion, representing an aid effort of 1.9% of its GDP (Ayllon, 2015, p.154).

Moreover, according to the UN-ECOSOC (2008), during that year, Venezuela's cooperation ranged between 1.16 and 2.5 billion dollars, a figure that would have been between 0.71% and 1.52% of the country's GDP and that placed it with Saudi Arabia and China, among the main external non-OECD donors. In addition, this cooperation positioned Venezuela, in terms of GDP percentage, among other OECD countries such as Norway (0.88% - 3.9 billion \$) and Sweden (0.98% - 4.7 billion \$) (OECD, 2009).

Despite the proactiveness of the country, it is important to highlight that there is no easy way to measure the exact amount of Venezuelan Cooperation in the LAC region. This situation generates significant difficulties in obtaining accurate data on developmental activities sponsored by Venezuela (Benzi & Zapata, 2013).

Still, the number of projects, activities, and the financing mobilized for their execution showed that the 2000s could be considered the golden decade of Venezuela's SSC since the economic resources and the political alliances experienced an incremental trend, at least until the first signs of the economic crisis that affected the nation in the second decade of the century, and the death of Hugo Chávez in 2013.

Therefore, based on the official documents that guided Venezuela's foreign policy and the specialized literature on the topic, table 1 synthesizes the strategies implemented by Venezuela during the study period:

Table 1: Venezuela's Foreign Policy strategies during Hugo Chavez's Government

Strategies
- Promote a new regional architecture through ALBA-TCP, PetroCaribe, UNASUR, and CELAC.
- Foster SSC among LAC countries.
- Diversify diplomatic relations with African and Asian countries.
- Increase diplomatic participation in international forums, including a bid for a seat in the UN Security Council.
- Diversify strategic alliances with non-traditional partners, such as China, Russia, India, Belarus, Iran, and Türkiye.

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- Promote the Socialism of the 21st Century.
  - Seek support in international forums.
  - Promote strategic alliance with politically aligned countries in the region and other parts of the world.
  - Soft Power.
  - Oil diplomacy.
  - Encourage regional integration without the U.S., especially through UNASUR, and CELAC.
  - Diversify oil markets.
  - Reinforce the role of the OPEC in the international system.
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Source: Elaborated by the author (2023)

## **The relationship between Venezuela and the closest politically allied nations (ALBA-TCP)**

### **Origin**

ALBA-TCP arose as an integrationist project promoted by the Venezuelan government presided by Hugo Chavez. Since 1999 President Chavez raised the idea of establishing a new regional integration mechanism, understood as a political union that would go beyond the traditional economic approaches of open regionalism, adapting it to the new times and highlighting national sovereignties.

However, it was not until December 14th, 2004, when the governments of Venezuela and Cuba, through the signing of an agreement between Presidents Chavez and Castro, decided to formally apply the ALBA.

Since its first declaration in La Habana in 2004, “ALBA has been an agreement for the liberation and self-determination of the people against the imperial impositions and the pretensions to hegemonize the culture and economies of our Americas, and against the ALCA and free trade agreements” (Ministerio de Relaciones Exteriores de Bolivia, 2009).

## Objectives and Scope

ALBA-TCP is a regional platform with a strong political imprint that aimed originally to counteract the ALCA initiative backed up by the U.S. government and has maintained its anti-U.S. sentiment through the years, aiming to diminish U.S. influence in the region as well as other initiatives promoted by neoliberal institutions like the IMF, the World Bank, and the IDB.

Since its creation in 2004 by Venezuela and Cuba, its membership has progressively increased as today to ten (10 members)<sup>4</sup> Bolivia (2006), Nicaragua (2007), Dominica (2008), San Vincent and the Grenadines, and Antigua and Barbuda (2009), St. Lucía (2013), St. Kitts and Nevis, and Grenada (2014).

At this point, it is important to highlight that at the time of joining this organization, most of these countries were governed by left or center-left-oriented leaders such as Fidel Castro (Cuba), Evo Morales (Bolivia), Daniel Ortega (Nicaragua), Rafael Correa (Ecuador), Ralph Gonsalves (St. Vincent and the Grenadines), Kenny Anthony (Saint Lucia), Denzil Douglas (St. Kitts and Nevis), which, to some extent, shared a similar ideology and vision with President Chavez.

## Institutional structure

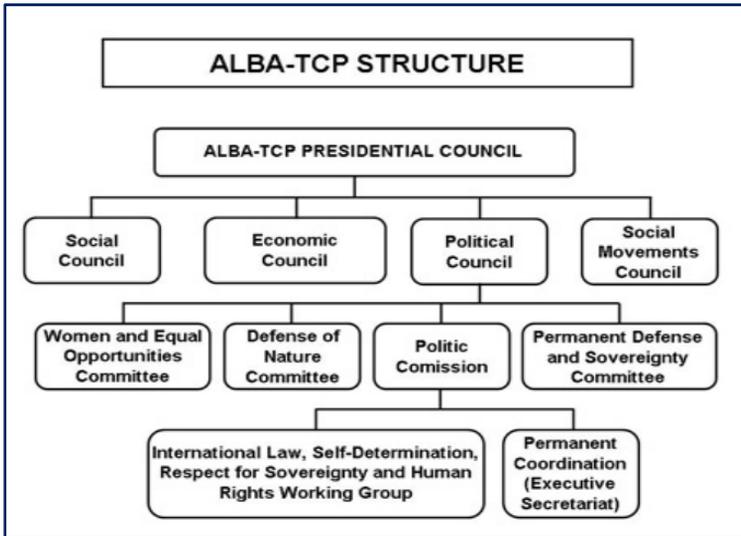
The most important political and decision-making instance is the Summit of Heads of State and Government. During the study period (1999-2013), twelve (12) regular summits were held, being Presidents Chavez (11 appearances), Morales, and Ortega (8 appearances each) the most active participants. Also, seven special summits were held, 3 in 2008 and 4 in 2009.

Beyond the Presidential Council, the organization has also created different councils subdivided into committees and commissions, such as the Social,

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<sup>4</sup> Honduras retired in 2010, and Ecuador in 2018.

Economic, Political, and Social Movements councils. By 2013, the organizational structure was as follows:



Source: SELA (2015a)

Figure 1: ALBA-TCP institutional structure

## Main instruments of cooperation and projects

### ALBA-Bank

The ALBA Bank is one of the financial organizations of the alliance. Based on its constitutive agreement, its purpose is to:

Assist with the sustainable social and economic development, reduce poverty and asymmetries, strengthen integration, and promote fair, dynamic, harmonic, and balanced exchange among member countries of the ALBA-TCP inspired by the principles of solidarity, complementarity, cooperation, and respect to the sovereignty of peoples (ALBA Bank, 2008, p.10).

The Bank's member states are Antigua and Barbuda, Bolivia, Cuba, Dominica, Nicaragua, St. Vincent and the Grenadines, and Venezuela. This financial institution has its headquarters in Caracas, Venezuela, and one office in La Habana, Cuba.

Until 2014, according to Sistema Economico Latinoamericano y del Caribe (SELA) (2015a), the ALBA Bank financed nine (9) projects with its own funds, for estimates of US\$ 44 million, while managed funds added up to 33 projects for US\$ 300 million, for a total of 42 projects for the estimated amount of US\$ 344 million.

Among the most important projects are financing the construction of a bovine slaughter central in Nicaragua (2011), providing funds to alleviate the effects of natural disasters such as Hurricane Sandy in Cuba (2012), renovating and rehabilitating areas for coffee cultivation in Nicaragua (2014), and financing the reconstruction of the Argyle international airport in St. Vincent and the Grenadines (2014) (ALBA-TCP, 2022).

### **ALBA Caribe Fund**

The Venezuelan government created this fund in the framework of the First PetroCaribe Summit of Heads of State and Government in 2005 to contribute to the economic and social development of Caribbean countries. The ALBA Caribe Fund was created within the PetroCaribe framework, specifically for ALBA participating countries (Girvan, 2011). This fund comprises “resources from the savings generated by the financing of the oil bill and direct trade, as well as from financial and non-financial instruments” (PDVSA, 2005).

In order to activate the fund, an initial capital of US\$ 50 million was provided by Venezuela. Since 2006, the fund has received multiple contributions, with the most recent one being for US\$ 200 million, agreed at the IX Extraordinary Summit of PetroCaribe, held in Caracas in March 2015 (SELA, 2015a). The ALBA Caribe Fund is administered by the state enterprise *Petroleos de Venezuela S.A.* (PDVSA) (Girvan, 2011).

Similarly, SELA (2015a) reported that by the end of 2014, 88 of 432 PetroCaribe projects were funded through the ALBA-Caribe Fund. Table 2 provides a detailed explanation of the projects carried out in member countries and the area of investment:

## SUCRE

The Unitary System of Regional Payment Compensation (SUCRE) was founded by Venezuela, Ecuador, Bolivia, and Cuba in 2010, with the later

Table 2: Projects of the ALBA-Caribe Fund

Member States	Projects
Antigua and Barbuda	Improvements to the international airport and service of potable water in Antigua.
Belize	Rural education projects; rural water system, paving of streets and draining systems; project for the increase in the production of food for self-sufficiency and export.
Cuba	Environmental sanitation Endogenous development
Dominica	Housing projects; construction of marine defense; programs of the Caribbean territory; poultry, fishing, and pork projects; sewage system; revamping of Melville Hall Airport; program of gas stations to supply fuel for fishermen and remove metal scrap.
Grenada	Urbanism of the community Simon Bolivar Village.
Guyana	Construction of a center for homeless.
Haiti	Construction of low-cost housing; acquisition of waste collectors; electricity projects and strengthening of the health program
Nicaragua	Environmental sanitation works; improvements of aqueducts, stoves and gas cylinders; roads and housing; equipment for health center; power generation plants.
St. Kitts and Nevis	Construction and expansion of housing.
St. Vincent and the Grenadines	Sports and fishing infrastructure, housing, rural roads, and aqueducts

Source: SELA (2015a)

addition of Nicaragua in 2013. It is a mechanism to channel international payments from reciprocal trade operations among its member countries. This system is based on the use of a virtual currency, “Sucre,” for the registration of operations exclusively between central banks, while local settlement is made with the respective local currencies of the member countries (Banco Central de Venezuela, 2018).

According to SELA (2015a), 5,657 operations have been registered for approximately 2,007 million Sucres (XSU), equal to US\$ 2,509 million, since it entered into force. Additionally, the number of operations performed through the system significantly increased during the study period: 6 in 2010; 431 in 2011; 2,646, its historical peak, in 2012; and 2,094 in 2013.

### Social programs

Since its genesis, ALBA-TCP has implemented cooperation aiming to improve the quality of life of the population of its member countries. The most visible projects have been carried out by Venezuela and Cuba in the fields of health and education.

These projects were replicated with other member states, fostering the exchange of goods, services, and capacities. Hence, from 2004 to 2013, diverse social programs were carried out within the ALBA-TCP in the following sectors:

Table 3: Social Programs by Sector

Education
Literacy: Over 3,800,000 people were taught to read and write until 2013, and 1,174,312 people have completed their primary education studies. Antigua and Barbuda, Cuba, Nicaragua, Bolivia, and Venezuela were declared free of illiteracy by UNESCO.
Within the framework of the International Scholarship Programme, scholarships have been awarded to more than 4,000 students from 48 countries in 88 training programs of 36 Venezuelan universities.
From 2005 to 2017, more than 28,500 students graduated from the Latin American School of Medicine (ELAM), 24,307 being nationals of the Alliance Member States.

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Health

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International Miracle Mission (2004-2014): 3,482,361 patients were operated, allowing them to recover and improve their visual capability.

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Programme Genetic, Psychosocial and Clinical Study of People with Disabilities: From 2009 to 2011, 3,841,797 households were visited in Bolivia, Cuba, Ecuador, Nicaragua, St. Vincent and the Grenadines, and Venezuela. Until June 2014, 1,285,089 people with disabilities received medical care.

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Since 2006, over 8,000 operations have been performed on children from Latin America and Africa at the Children's Cardiology Hospital Dr. Gilberto Rodríguez Ochoa.

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Source: SELA (2015) and Brun (2021)

## **The relationship between Venezuela and the Caribbean (PetroCaribe)**

### **Origin**

Using energy resources, especially oil, is not a new aspect of Venezuela's foreign policy. The review of previous arrangements between Venezuela and partner countries shows that even though the PetroCaribe agreement represents an innovative platform due to its scope in the number of issues and membership, it originates from two previous agreements: the San Jose Agreement of 1980 and the Caracas Agreement of 2000.

PetroCaribe materialized on June 28th, 2005, in Puerto La Cruz, Venezuela, with the signing of the Energy Cooperation Agreement.

### **Objectives and Scope**

PetroCaribe was conceived as an initiative of energy policies, using Venezuela's natural energy resources for its member states' benefit and as a platform for coordinating and managing the energy relations among its members.

According to the Venezuelan MoFA (2016):

Petrocaribe has formed a different scheme in terms of energy cooperation and complementarity since its objectives aim to move far beyond the simple supply of crude oil with payment facilities. Petrocaribe is founded on solidarity and human perspective to achieve one of its core objectives: the elimination of asymmetries and inequalities. This strategy, in the short, medium, and long term, contributes to energy security, socio-economic development, and the union of the peoples of the Caribbean and Central America based on the sovereign use of energy resources (p.27).

Petrocaribe comprises 19 member states: Antigua and Barbuda, Bahamas, Belize, Cuba, Dominica, Grenada, Guyana, Jamaica, Dominican Republic, Saint Kitts and Nevis, Saint Vincent and the Grenadines, Saint Lucia, Suriname, Haiti, Nicaragua, Honduras, Guatemala, El Salvador, and Venezuela.

In contrast to ALBA-TCP, in which left and center-left governments led most of the member states at the time of adhesion, PetroCaribe encompassed governments with different tendencies. In this direction, Altmann (2009) argued that participation in this initiative did not necessarily imply an ideological-political adherence but rather a willingness to take advantage of the economic opportunities. Consequently, in his view, “this explains why the ALBA has achieved the support of a limited number of countries, while nearly all the Central American and Caribbean countries participated in PetroCaribe” (p.127).

### **Institutional Structure**

According to the PetroCaribe Energy Cooperation Agreement, the institutional platform of the initiative consisted of two main instances: the Ministry Council, made up of Ministries of Energy of the member states, and an Executive Secretariat that would have been exercised by the Minister

of Energy and Petroleum of Venezuela.

## Main instruments of cooperation and projects

### Long-term finance and payment conditions

PetroCaribe offered long-term financing to the member states following the mechanism stipulated in its constitutive agreement in 2005. The financing mechanism was slightly adjusted in 2008, as presented in table 4:

Table 4: Line of financing

2005 conditions		2008 conditions		Condition
Prince per barrel in US\$	% to finance	Prince per barrel in US\$	% to finance	
≥ 15	5	≥ 15	5	2-year grace period 17 years to pay At a 2% interest rate
≥ 20	10	≥ 20	10	
≥ 22	15	≥ 22	15	
≥ 24	20	≥ 24	20	
≥ 30	25	≥ 30	25	
≥ 40	30	≥ 40	30	2-year grace period 25 years to pay At a 1% interest rate
≥ 50	40	≥ 50	40	
≥ 100	50	≥ 80	50	
		≥ 100	60	
		≥ 150	70	

Source: Elaborated by the author based on SELA (2015b)

Therefore, member states have 17 years to pay the oil bill, including the two-year grace period, as long as the oil price remains under 40 dollars per barrel. When the price exceeds 40 dollars, the payment period will be extended to 25 years, including the two-year grace period mentioned, reducing the interest to 1%.

## PDV Caribe

In September 2005, the Venezuelan government founded PDV Caribe, a subsidiary of PDVSA. Beyond administering the ALBA Caribe fund as explained in section 3.4.2, this company plans and executes the activities of transportation, reception, storage, distribution, and commercialization of hydrocarbons, along with the necessary infrastructure projects to ensure the management of the energy resources in member states (PDVSA, 2005).

## PetroCaribe in numbers

Based on data provided by SELA (2015b), PetroCaribe has promoted energy availability to its member states by meeting, on average, 32% of their oil demand. In other words, from 2005 to 2014, 307 million oil barrels were supplied to 13 member countries, although the main destinations were the Dominican Republic, Jamaica, Nicaragua, and Haiti. The initiative also increased access to energy resources by financing approximately 50% of the oil bills, that is, US\$ 28,000 million, and promoted trade of goods and services of more than US\$ 3,247 million during the same period.

Likewise, SELA (2015b) informed that the supply of hydrocarbons to thirteen countries under a quota of 129 thousand barrels per day was based on the following distribution:

Table 5: Quotas and supply of fuel to PetroCaribe member states 2015 and Thousands of barrels per day (MBD)

Country	Quota	2015 average	% Performance
Dominican Republic	30	7.5	25
Jamaica	23.5	20.7	88
Nicaragua	27	22.3	83
Haiti	14	20.7	148
Guyana	5.2	4.9	94
Antigua and Barbuda	4.4	1.8	40
Grenada	1	0	0

Saint Kitts and Nevis	1.2	0	0
Dominica	1	0.3	26
Saint Vincent and the Grenadines	1	0	0
Belize	4	3.2	80
Suriname	10	1.6	16
El Salvador	7	12.9	184
<b>Total</b>	<b>129</b>	<b>96</b>	<b>74.4</b>

Source: SELA (2015b)

Additionally, data from other sources such as the UN-ECLAC (2014) and the IMF (2015) indicated that PetroCaribe financing averaged from 2.5% to 3.5% of importing countries' GDP and about 6% of GDP for the small islands of the Organization of Eastern Caribbean States in 2014. Consequently, countries like Guyana, Nicaragua, Haiti, and Belize showed a larger impact on their GDP at 4.7%, 4.3%, 4.1%, and 3.5%, respectively.

Moreover, in the social area, a total of 432 projects that account for US\$ 3,944 million in investment were implemented by PetroCaribe since its creation until 2014. These projects are reflected in Table 6:

Table 6: PetroCaribe Projects and Investments

Sector/activity	No. Projects	Investment Total%
Home sectors	41	34%
Housing, habitat and, road construction	115	21%
Institutional strengthening	44	12%
Production sectors	33	11%
Agriculture and food	45	10%
Education	31	4%
Environment	23	2%
Social welfare and assistance	19	2%
Public service	20	2%
Culture and sports	50	1%
Health	11	1%
<b>Total</b>	<b>432</b>	<b>100%</b>

Source: SELA (2015b)

## **The relationship between Venezuela and South American nations (UNASUR)**

### **Origin**

The origins of UNASUR can be traced to the first Meeting of the Presidents of South America in 2000, in Brazil, and the creation of the Community of South American Nations during the Third Summit of South American Presidents in Cuzco, Peru, on December 8th, 2004. The Community of South American Nations was established to unite two regional platforms: MERCOSUR and the Andean Community (Parish, 2012; Servicio Nacional de Aduana del Ecuador, 2022).

Later in April 2007, at the 1st South American Energy Summit held in Margarita, Venezuela, the government representatives decided to change the name of the Community of South American Nations to UNASUR.

However, it was not until May 3rd, 2008, at the Extraordinary Meeting of the Council of Heads of State and Government, held in Brasilia, Brazil, that the representatives of the 12 member states signed the Constitutive Treaty of the bloc. (UN South-South Galaxy, 2022).

### **Objectives and scope**

It can be said that UNASUR is an intergovernmental organization created with the conception of the European Union model to achieve regional integration. This organization had twelve member states: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay, and Venezuela.

Its general and specific objectives are reflected in its constitutive agreement. In this sense, article 2 states that:

The objective of UNASUR is to build, in a participatory and consensual manner, an integration and union among its peoples in

the cultural, social, economic, and political fields, prioritizing political dialogue, social policies, education, energy, infrastructure, financing, and the environment, among others, with a view to eliminating socio-economic inequality, in order to achieve social inclusion and participation of civil society, to strengthen democracy and reduce asymmetries within the framework of strengthening the sovereignty and independence of the States (UNASUR, 2008).

Even though most of the member states of UNASUR were led, during the study period, by left and center-left governments, and there was a common goal towards South American integration, this regional organization was, to some extent, the stage of the confluence of two different development models promoted by Brazil and Venezuela (Ríos Sierra, 2011; Borda, 2012; Bautista, 2014).

On one side, the Brazilian government led by President Lula saw in UNASUR a new way of international insertion with an autonomous character, reinforcing the strategic positioning of the South American region and the Brazilian regional leadership (Bautista, 2014).

Hence, through UNASUR, Brazil adopted a pragmatic approach aiming to reinforce other regional organizations in which it already had an established leadership, such as MERCOSUR and the IIRSA. However, even though Brazil aimed to portray the role of regional power, it tried to keep steady relationships with other actors like the U.S. while respecting the scope of other organizations like the OAS and the Andean Community.

On the other hand, when analyzing Venezuela's engagement in this initiative, we can see that President Chavez had a more radical proposal for this organization. Special mention must be given to the topic of security and defense from the Venezuelan perspective. Throughout the South American Defense Council, Venezuela attempted to create a South Atlantic Treaty Organization proposing a South American Army to defend the region against external threats. However, "President Chávez's vision, shared by Bolivia and to a lesser degree by Ecuador, implied a clear confrontation with

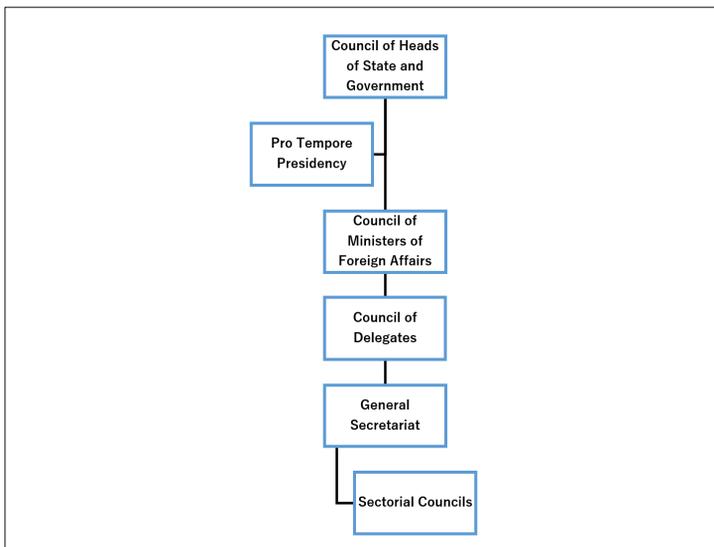
the U.S., a stand that was neither shared nor promoted by Brazil” (Borda, 2014. p.3).

### Institutional Structure

UNASUR’s institutional structure is given by its constitutional agreement. In this sense, Article 4 establishes that the organization’s bodies are: the Council of Heads of State and Government, the Council of Ministers of Foreign Affairs, the Council of Delegates, and the General Secretariat.

Likewise, article 5 states that “Sectoral Ministerial Meetings and meetings of the Councils at Ministerial level, Working Groups and other institutional levels may be convened as required on a permanent or temporary basis.” Moreover, article 7 institutes the Pro Tempore Presidency of the Union.

Consequently, figure 2 illustrates the institutional structure of UNASUR based on the guidelines established by its constitutive agreement:



Source: Elaborated by the author (2023)

Figure 2. UNASUR Institutional Structure

## Main initiatives

Since its foundation in 2008, UNASUR has promoted numerous projects in different fields, including security and defense, health, electoral processes and democracy, regional finance and infrastructure<sup>5</sup>. Table 7 explains some of the most important projects achieved through this regional organization:

Table 7. UNASUR's main initiatives

Field	Project / Year / Location	Aim
Security and Defense	South American School of Defense (2015), Quito, Ecuador.	It seeks to instruct on defense and security issues, both at the civil and military level, following the principles of a regional strategic vision.
	Centre for Strategic Defense Studies (2011), Buenos Aires, Argentina,	It aims to coordinate and harmonize regional defense and security policies through joint strategic thinking.
Health	South American Government Institute of Health (2011), Rio de Janeiro, Brazil.	It is an inter-governmental organization of a public nature that promotes the dissemination of knowledge in health and high-level human resources training.
Electoral processes and democracy	Electoral Mission: 2015 - Suriname - Venezuela - Guyana - Bolivia 2014 - Bolivia - Colombia - Ecuador 2013 - Venezuela - Paraguay - Ecuador 2012 - Venezuela	The observation and accompaniment of electoral processes of member states in an Electoral Mission of UNASUR.

<sup>5</sup> Through the South American Council for Infrastructure and Planning, the member States promoted diverse projects related to infrastructure development and land, aerial, and maritime interconnection.

Regional finances	Bank of the South (2009), Caracas, Venezuela	Its purpose is to finance the economic and social development of the region in a balanced and stable manner, using intra- and extra-regional savings, strengthening integration, reducing asymmetries, and promoting the equitable distribution of investments within the member countries of the bank.
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Source: Elaborated by the author based on Bank of the South (2007) and SELA (2015c)

## The relationship between Venezuela and the Latin American and Caribbean Nations (CELAC)

### Origin

It can be said that CELAC has its origin in the Rio Group–Caribbean Community Unity Summit, held in Cancun, Mexico, on February 23, 2010. There, LAC Heads of Government and State approved the creation of a new regional organization that merged two previous platforms: the Latin American and Caribbean Summit on Integration and Development and the Rio Group.

CELAC was officially inaugurated by President Hugo Chavez on December 3, 2011, in Caracas, Venezuela, with the signature of the Declaration of Caracas, which conceives it as an intergovernmental organization for dialogue and political agreement, encompassing the thirty-three countries in LAC.

O'Boyle (2015) pointed out that:

The late Venezuelan President Hugo Chávez, one of CELAC's biggest champions, qualified the nascent group as an effort to challenge the "interference" of the U.S. Venezuela and Cuba's

leadership roles in the bloc led some to describe the group as an attempt to reject U.S. influence.

Like O'Boyle, other analysts have seen the creation of CELAC as an initiative to counteract the OAS and diminish the U.S. influence in the region since this regional body includes Cuba, which is not part of the OAS and excludes the governments of the U.S. and Canada (Segovia, 2013; O'Keefe, 2020; Kilroy Jr, 2022).

### **Objectives and scope**

CELAC was born as an alternative to the OAS and U.S. influence in the region. It also seeks to represent the interests of a wider set of actors since it includes countries from ALBA-TCP, PetroCaribe, UNASUR, MERCOSUR, the Andean Community, the Pacific Alliance, and Caricom, generate political consultation, and achieve political consensus to express the voice of the region as one.

In this line, SELA (2022) summarizes the scope of CELAC in 5 main points: 1) It is a mechanism of dialogue and political concertation; 2) It is an articulating mechanism that works based on consensus; 3) It is a forum to advance towards the convergence of actions and common interests; 4) It is a platform that facilitates a major presence of the LAC region in the world; 5) It is a space to face common challenges.

Regarding its membership, this regional organization comprises the 33 states of Central America, the Caribbean, and South America: Antigua and Barbuda, Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, México, Nicaragua, Panamá, Paraguay, Peru, Dominican Republic, San Kitts & Nevis, Saint Vincent and the Grenadines, Saint Lucia, Surinam, Trinidad & Tobago, Uruguay, and Venezuela.

## **Institutional Structure**

The institutional structure of CELAC is drawn in the document entitled “Procedures for the Organic Operation of CELAC,” (2011) which determined that the organization is comprised by the following bodies:

- The Summit of Heads of State and Government
- Meeting of Ministers of Foreign Affairs
- Pro Tempore Presidency
- Meeting of National Coordinators
- Specialized Meetings
- Troika

Until 2023, eight CELAC Summits have taken place.

## **Main instruments of cooperation and projects**

Since its foundation, the CELAC has served as a platform to promote and deepen political dialogue among LAC countries in different areas that affect the region, such as social and economic development, education, nuclear disarmament, culture, energy, and the environment.

Additionally, based on its mandate, CELAC works as the unified voice of the region on issues of political consensus, being the only regional body that can promote and project the voice of LAC in the discussion of critical global issues, aiming to achieve a more successful insertion and positioning of the region at the international level (CARICOM, 2022).

Hence, the role as a regional political consensus builder allows the organization to act as a spokesman for the community with other countries and regional blocs, including the EU-CELAC summit, the China-CELAC forum, dialogues with Russia, Türkiye, and Japan, among others.

### **E.U-CELAC Summit**

The E.U-CELAC summit, established in January 2013, is the main forum for dialogue and cooperation between Europe and LAC. Official information reflects that during the first summit in 2013, the government representatives focused on trade collaboration and the promotion of investments in social and environmental quality.

Likewise, at the second summit celebrated in 2015, leaders agreed to improve cooperation on three major global issues: climate change, the post-2015 development agenda, and the fight against drugs. Additionally, the EU announced an investment of 25 million euros to the improvement of broadband trans-Atlantic connectivity between the LAC region and the EU (European Council, 2018).

### **The China-CELAC Forum**

The China-CELAC forum was created during the China-LAC Summit held in Brasilia on July 17th, 2014. There, President Xi Jinping announced an economic package for US\$ 35 billion towards the region, which consists of three parts: “a Preferential Loan of US\$ 10 billion, a Special Loan Program for China-LAC Infrastructure Project of US \$20 billion, and China-LAC Cooperation Fund of US \$5 billion” (Ministry of Foreign Affairs of China, 2016, p.39).

The Chinese President also expressed that China “would provide CELAC countries with 6,000 governmental scholarships, 6,000 training opportunities, and 400 opportunities for on-the-job master’s degree programs in China between 2015 and 2019” (Ministry of Foreign Affairs of China, 2016, p.51).

Other instruments:

- In September 2013, the Ministers of Foreign Affairs of CELAC and Japan held the first Japan-CELAC Foreign Ministers’ Meeting, where the parties expressed their willingness to promote political dialogue and explore possible areas of cooperation.

- In September 2015, representatives of CELAC and Russia decided to establish the Permanent Mechanism for Political Dialogue and Cooperation, to strengthen cooperation and develop a political dialogue.
- In April 2017, the Ministers of Foreign Affairs of CELAC and Türkiye launched the Türkiye-CELAC Political Dialogue and Cooperation Mechanism to increase dialogue and deepen relations on areas of common interest.

Sources: Ministry of Foreign Affairs of Japan (2013) and CELAC (2015) (2017)

## **Venezuela's government evaluation of these initiatives.**

The evaluation obtained from the interviews with key informants from the Venezuelan government shows a positive perception, as we can observe in the following statements:

For the Venezuelan Ambassador to Japan, Mr. Seiko Ishikawa<sup>6</sup>:

The role of these organizations was huge since these are spaces of articulation that were created at the regional level to advance not only in cooperation among LAC nations but also to conform new ideas about the new model of integration that was emerging in the region, which goes beyond the narrow vision of economic and commercial topics and covers other elements to bring well-being to the population. These organizations started to create a doctrinaire body seeking to shield the region and to establish an important pole within the new international balance.

Likewise, the Secretary of the National Commission for Cooperation with UNESCO, Ambassador Jose Duarte<sup>7</sup>, said that:

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6 Interview through personal communication via Zoom on November 25<sup>th</sup>, 2021.

7 Interview through personal communication via written response, received on October

ALBA-TCP, PetroCaribe, UNASUR, and CELAC became options for Latin American regionalism, which projects are expressions of Venezuela's foreign policy led by President Hugo Chavez. The objectives of these organizations seek, in the framework of SSC, to reinforce the sovereignty and self-determination of the people and counteract the economic and military policies that are driven by the U.S. and some international organizations.

Furthermore, the former Venezuelan Ambassador to India, Mr. Augusto Montiel<sup>8</sup>, when assessing the impact of these initiatives, mentioned specific examples of the successes of these organizations:

The existence of the Latin American School of Medicine allowed students from all over the world to come to Venezuela and become doctors, and Venezuela paid for that; students had to pay nothing since it ran under the Venezuelan budget completely.

These, among other impressions, confirm the positive assessment made by Venezuelan government officials, who highlighted the role of these organizations in promoting regional integration and political consultation, creating a collective identity of LAC countries, diminishing the U.S. influence and neoliberal models promoted by international organizations such as the IMF in the region, and bringing tangible benefits to the population.

In addition, it is also possible to observe that in the view of the Venezuelan government officials, President Chavez's leadership and political thought had a crucial role in the conformation and development of these initiatives and in the political imprint that characterized these organizations.

Despite the positive assessment of the Venezuelan policymakers, there were also adverse opinions at the national level. Clear examples of the criticism and lack of acknowledgment regarding Venezuela's SSC by Venezuelan citizens were presented by Magdaleno (2011) when studying the public

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18<sup>th</sup>, 2021.

8 Interview through personal communication via Zoom on September 18<sup>th</sup>, 2021.

opinion of Venezuela's foreign policy. This study showed the results of different public opinion surveys that reflected that during 2006 and 2007, between 60% and 70% of the population rejected the foreign spending made by the Venezuelan government. According to the study, the main reason for this negative perception was that "it is very difficult for Venezuelans to reconcile a foreign policy that relies so highly on spending in other countries with the poverty in their own country" (Magdaleno, 2011, p. 64).

## Perceptions of partner countries and other regional actors.

Additionally, throughout the in-depth interviews, the author inquired about the perception of partner countries and other regional actors regarding Venezuela's SSC through these four initiatives to better understand the perception of Venezuela's SSC in the region.

For example, the Venezuelan Ambassador to the U.N, Mr. Hector Constant<sup>9</sup>, stated that:

There is a double perception. Firstly, there is a perception of support; we were in a golden moment for the regional left, and consequently, there was an enormous feeling of empathy in the LAC region to strengthen these newly created spaces. This situation generated a complementarity and complicity of regional leaderships to our vision. On the other hand, some countries and actors had double visions, a perception of support but simultaneously a perception of jealousy toward Venezuelan leadership.

Similarly, Colonel Levis Gonzalez<sup>10</sup>, former Venezuelan Military attaché to Ecuador, highlighted that "partner countries and other regional actors (particularly left-oriented) received with great approval the opportunities that

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<sup>9</sup> Interview through personal communication via Zoom on June 8<sup>th</sup>, 2022.

<sup>10</sup> Interview through personal communication via written response, received on November 8<sup>th</sup>, 2021.

were opened with the activation of these agreements of SSC.”

Likewise, Professor Luis Angarita<sup>11</sup> expressed that "from partner countries, there was gratitude. The existence of cooperation and policies that promoted the recipient's economy more than the Venezuelan economy was always supported." Furthermore, the journalist Luisana Colomine<sup>12</sup> said that: "in general terms, the perception was positive. However, some of the countries retired from political reasons, defending Mercosur, the IDB, and more recently ProSur".

The positive perception from partner countries can also be validated through the opinions expressed by regional heads of State when talking about Venezuela's SSC. For example, in 2005, Argentine President Nestor Kirchner, in a bilateral meeting held in Argentina with President Chavez, stated:

I have complete confidence in your concepts, in your vision, in the understanding that it is essential, based on the relative truth of each of our countries and their relative needs, to find the space that will allow us to decisively contain the region and turn it into a voice in the world, where we are definitely taken into account as a region with common ideas, with common interests and integrated with solidarity. It is up to us to find answers to that challenge (Casa Rosada – Presidencia, 2005).

Similarly, Brazilian President Lula Da Silva, in a bilateral meeting with President Chavez celebrated in Brasilia in 2010, declared, "I have no doubts about the politics of Venezuela. The relationship between Venezuela and Brazil is irreversible," adding that "I am aware that Venezuela has become an incredible partner for Brazil and the whereabouts of many Brazilian businessmen who are making money and increasing the standard of industrialization" (Notimerica, 2010)

Also, in a bilateral summit between the heads of State of Ecuador and

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11 Interview through personal communication via Zoom on October 12<sup>th</sup>, 2021.

12 Interview through personal communication via written response, received on March 3<sup>rd</sup>, 2022.

Venezuela, celebrated in 2011, in Santa Elena, Ecuador, when asked about the impact that the cooperation between Venezuela and Ecuador would have on the population, President Rafael Correa expressed:

Of course, the agreements we have signed —otherwise, we would not sign them— contribute to good living. We have given an example of how the agreements benefit. For example, only the exchange of crude oil for derivatives, the country (Ecuador) has saved more than 330 million dollars. We have the lubricant factory at lower prices, which is increasing its market share every time. We are building the Pacific Refinery together; in case there is not enough oil in Ecuador, it will be oil from Venezuela that is refined. In other words, there are strategic complementarities, right? So, of course, all these things are extremely important for the good life of our two countries (Todo Chavez en la Web, 2011).

Moreover, the deeply personal relationship between President Chavez and other regional leaders like Fidel Castro in Cuba, Nestor Kirchner and Cristina Fernandez in Argentina, Lula Da Silva in Brazil, Rafael Correa in Ecuador, Jose Mujica in Uruguay, Michelle Bachelet in Chile, Fernando Lugo in Paraguay, and Evo Morales in Bolivia, fostered political alliances and helped to create the image of a common multipolar political project shared by all these nations fostering the positive perception of Venezuela's cooperation throughout the continent.

Nonetheless, according to some key informants such as Professors Carlos Romero<sup>13</sup> and Javier Corrales<sup>14</sup>, and journalists Madelein Garcia<sup>15</sup> and Halim Naim<sup>16</sup>, even though the perceptions based on the partner countries' official positions were positive, Venezuela's SSC also generated a negative perception in the opposition political forces inside these countries since it was seen as political cooperation used to maintain left-wing political allies in power

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13 Interview through personal communication via Zoom on December 21st, 2021.

14 Interview through personal communication via Zoom on December 15<sup>th</sup>, 2021.

15 Interview through personal communication via Zoom on June 3<sup>rd</sup>, 2022.

16 Interview through personal communication via Zoom on February 10<sup>th</sup>, 2022.

instead of bringing tangible results for economic and social development, situation to which some extent translated in an anti-Venezuelan sentiment in Latin American political sectors opposed to President Hugo Chavez.

Additionally, there was a consensus among the key informants that in countries that prioritized their relationship with the U.S. and where the governments were not aligned with left-wing-oriented models, Venezuela's SSC had a negative perception. Consequently, countries like Colombia under Presidents Alvaro Uribe (2002-2010) and Juan Manuel Santos (2010-2018), Mexico under President Felipe Calderon (2006-2012), and Chile under the first presidency of Sebastian Piñera (2010-2014), perceived Venezuela's SSC as a tool of President Chavez for the promotion of a political model, generate ideological alliances, and diminish the U.S. influence in the region.

## Conclusion

The Venezuelan government, during the Chavez's administration, took diverse approaches to the promotion of SSC through the regional organizations analyzed in this paper (ALBA-TCP, PetroCaribe, UNASUR, and CELAC), each one linked to an identity and a form of relationship that aimed to promote Venezuela's interests in the region and globally.

ALBA-TCP and PetroCaribe were Venezuela's flag initiatives to promote SSC at the regional level since Venezuela was the main founder member and the country with more economic and political weight within these organizations.

Firstly, ALBA-TCP came into the scene as an alternative to the ALCA promoted by the U.S. Since its genesis, this organization aimed to promote a new kind of trade, as opposed to the free trade agreements, based on the strengths and commonalities of its member countries. Nevertheless, with time Venezuela promoted a holistic approach within this organization to establishing SSC, which addresses different topics such as education, trade, investment, humanitarian assistance, and cultural and sports exchanges,

among other areas. This organization holds a strong political component characterized by its anti-imperialist rhetoric.

However, despite the strong anti-imperialist rhetoric and the close political alignment of its member states, the cooperation provided by Venezuela through this organization generated tangible results for the population of these countries. Among the most important ones are the declaration by UNESCO of Antigua and Barbuda, Cuba, Nicaragua, Bolivia, and Venezuela as territories free of illiteracy, the graduation of more than 25 thousand professionals from the ELAM, more than 3 million people have received eye surgery to improve their visual capacity, and many other projects were financed in different fields such as agriculture, sport, food sovereignty, tourism, and infrastructure building.

Secondly, PetroCaribe, originating in previous bilateral agreements, was reinforced by the Venezuelan government to achieve regional energy self-reliance and diminish the energy dependence of Caribbean countries on the U.S.

Venezuela used PetroCaribe to take advantage of its strength as an oil country and foster energy cooperation at a time when the oil prices in the international market recorded a significant rise. Through this agreement, partner countries received Venezuela's oil, gas, and other hydrocarbon commodities at preferential prices or in exchange for other goods produced by these countries.

As well as ALBA-TCP, despite the political motivations that could have been behind these organizations, based on official data from international organizations such as SELA, the IMF, or UN-ECLAC, the energy cooperation and long-term finance schemes established by Venezuela caused a positive impact on Caribbean economies, helping them to have economic growth. This impact was more evident in small Caribbean countries like Guyana, Nicaragua, Haiti, and Belize, where the impact on the GDP was at 4.7%, 4.3%, 4.1%, and 3.5%, respectively.

Venezuela was also an active promotor of SSC projects through UNASUR

and CELAC. Following its ideas and interests, Venezuela saw in these organizations a way to achieve regional integration, decrease the U.S. influence in the region, and promote the construction of a multipolar world.

The Venezuelan government bet on UNASUR as an integrationist project that included all South American countries. This organization, while it was conceived to some extent with the conception of traditional models of integration, like the EU, encompassed a wide variety of issues such as political dialogue, health, social development, infrastructure and planning, economy and finances, education, culture, science technology and innovation, and security and military cooperation.

However, because of the larger membership of these organizations and the economic weight of Brazil and Argentina, Venezuela's influence on these platforms was not as marked as in ALBA-TCP or PetroCaribe.

Still, for President Chavez's administration, the creation of the South American Council of Defense represented an important political victory since it established a new collective doctrine of security and defense beyond the traditional one historically promoted by the U.S.

Also, Venezuela actively participated in CELAC, which became the principal hemispheric forum for political concertation and coordination. This organization was conceived as an alternative to the OAS to address regional issues without the interference of North American countries. The creation of CELAC allowed major political dialogue between LAC governments on different topics and offered a unitary platform to achieve better negotiation conditions with other nations and regional blocs.

Moreover, and not exclusively to Venezuela, UNASUR and CELAC have also brought benefits to other countries in the region. For example, through UNASUR, the member States promoted numerous infrastructure projects to develop new interconnections and improve the previously existent. Likewise, through CELAC, the region has achieved new partnerships such as the EU-CELAC Summit or the CELAC-China Forum, which bring new availability of resources through FDI, new commercial opportunities, and

other projects to improve the region's existing socio-economic conditions.

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*Diplomacy*. Doctoral dissertation, Tohoku University.

Article Received: 2023. 05. 26

Revised: 2023. 08. 11

Accepted: 2023. 08. 17



## **Book Review**

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Book Review

**The New Age of Empire: How Racism and Colonialism Still Rule the World**

*The New Age of Empire: How Racism and Colonialism Still Rule the World*, by Kehinde Andrews, London: Allen Lane-Penguin Random House, 2022.

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The New Age of Empire is an excellent book that analyses the pillars of Western civilisation and the wealth of the current rich economies over the past five centuries: genocide, slavery and colonialism. The legacies of these pillars remain today, shaping both wealth and inequality in a hierarchy of White supremacy of the West. This supremacy crosses other aspects of race, gender, social class and other social division. These pillars also fuel racism, classism, brutality, segregation, corruption and organise crime.

Andrews Kehinde Nkosi conducted an historical study, nourished by examples that cross the time in order to demystify the message of the West that we have moved beyond racism and we are in a post-racial society, since Britain and USA boast these narratives, however they are the main countries to experience racial inequality, police brutality, abuse of power, economic differences, health inequalities and low pay jobs for people from Black and Brown background.

Kehinde, who is specialised in Black Studies, indicates that the world looks different today than it did four hundred years ago, but the same colonialist logic continues to shape the world in the image of White supremacy and Western countries.

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Kehinde exposes the logic of Western imperialism from its formation until the New Age of the Empire, in which United States is at the heart of this empire. From the history of the West, Kehinde reminds us, that at the end of the fifteenth century Europe was isolated from the rest of the world. Europe was in the Dark Ages dominated by religious dogma and feudal repression. 1492 marked the beginning of the West with the discovery of the New World or Americas by Christopher Columbus, the expulsion of Jews from Spain and the fall of the Muslim city of Granada, Spain, and the entire fall of the Moorish Empire that continues with the expulsion of Moriscos or Moors between 1609 and 1614 from Spain. The Moors ruled Spain for 700 years. The Muslim empire stretched out of North Africa, and by the early eighth century, the Muslims occupied over 5 million square miles of land, an area larger than the Roman Empire.

The emergence of the West was accompanied with the enlightenment of the seventeenth and eighteenth centuries that will shape the intellectual processes of the modern world with rational and scientific values, which will justify the colonial expansion and White superiority.

Kehinde analyses the main philosophers or scientists of the West from Kant, Hegel, Locke to Darwin. The science was developed under a perspective of racial science with superiority of the White race over the rest. This line of thinking will be absorbed by future politicians and scientists. Kehinde quotes from Thomas Jefferson in the United States, who once said “I believe Black people are distinct by time and circumstances inferior to the Whites in the endowments of both mind and body”.

Kehinde, who is founder of the Harambee Organisation of Black Unity in the UK, considers that one of Western reasons of White Supremacy was the idea that those who are at the top of the racial hierarchy had the monopoly on knowledge.

According to Kehinde, the enlightenment was a product of the first stage of the Western Imperialism, with slavery and colonialism clearing the ground for its intellectual project. It provides the intellectual bridge to the New

Age of Empire, which maintains colonial logic, but has clothed itself in the legitimacy of democracy, human rights and universal values.

In Roman societies these attributions were reserved in the first instance to the wealthiest and patricians who held political and public positions. Kehinde made a parallel with the eighteenth century US society. The racist nature of inclusion in democracy and politics were reserved for White and wealthy men. For example the original US constitution, property was at the foundation of how rights were granted. The same was true in Europe, where in order to vote, it was necessary to be a White, male and have money.

For Andrews Kehinde, the founder of the Black Studies programme in Europe, indicates that European expansion into the Americas was vital to the development of the West. The genocide in the Americas was without precedent, wiping up 99% of the natives. For example, just in the Caribbean, the Taino indigenous groups passed from the first contact with Columbus in 1492 until 1509 from 8 million to just 100,000 and by 1542 there were only 200 left. Certainly new viruses were part of the killers of native people, but the genocide by Europeans was without parallel. Columbus instituted a law of tribute, which meant that if a native did not meet their quota of gold, they would have limbs chopped off. The brutal conditions in which the indigenous people were forced to work, made them succumb.

The same logic was applied in the expansion of the US. Indigenous populations of California was reduced from 310,000 -750,000 in 1800 to just 18,000 in 1907. Native Americans were erased from their lands and eventually moved onto reservations, where they would be unable to interfere in the development of the United States. General Sherman from the American Army said the Indians should be annihilated. Erasing the natives was a necessary foundation to build the development of the West. The Americas provided the territory necessary for the production that fuelled the development of the industry of sugar, cotton, coffee, cacao, palm oil, coconut oil and so on. The Colonialisation of the region was a precondition for

slavery. Once the natives were made extinct the transatlantic slave trade began to provide the labour that built the modern world. In this sense, the genocide in the Americas cleared the way for the population explosion of Europeans and the political and economic system, which sustained them today.

According to Kehinde, who is also director of the Centre for Critical Social Research, slavery provided the fuel of labour to develop the British Industry, the development of the capital and the financial systems that we have today. From this perspective, development of the industrial revolution was in line with the colonial violence, genocide and slavery. Even James Watt and Matthew Boulton, who were the engineers that created the steam engines and were benefited from this system, which allowed the development of trains and boats. Watt expressed eternal “gratitude” to slave owners in the Caribbean because it was their finances that allow him to realise his design and ambitions for the steam engine. Plantations were the first sector to benefit from industrial mechanisation in order to refine sugar.

The industry of cotton is another example of success business based on slavery. The industry of cotton was based on the import of raw cotton, which grew from £11 million to £283 million between 1784 and 1832 in England.

Kehinde underlines that the entire Western economic system depended on the wealth from slavery. For instance, Kehinde says, the Bank of England has acknowledged that many of the Bank’s directors in the eighteenth century were slave-owners or their descendants. The bank used to secure loans based on the number of slaves. This practice was quite common. Kehinde traced also the accounting firms and he found that they also used Slavery trade. Two the largest firms in the world today, Deloitte and Price Waterhouse Coopers were founded by families enriched by profits from slavery.

Kehinde, tracked the history of Lloyd’s of London, one of the largest British’s Bank companies, that has more than 325 years of existence, and its roots were linked to “insuring the merchant trade” based on slave trade. Kehinde quotes “In the early years, when Lloyds’ was a coffee house and nothing more, many advertisements in the London Gazette about runaway

slaves listed Lloyd's as the place where they should be returned".

In the US one of the nation's largest health insurance companies, Aetna founded in 1853, used to sell insurance policies for the enslaved on US plantations. In 1853 Aetna New Orleans were selling policies for \$17.53 per year, which would yield \$600 if the enslaved African died. It is estimated that 12 million Africans arrived in chains in the Americas and in the Caribbean, but this doesn't account those who were smuggled illegally.

The dividends of the slavery were also in other sectors such production of commodities, mining, trade, banking, insurance services, universities and so on. It should be no surprise that people accessing to university education were also slave traders for example, the University of Yale, one of the most prestigious universities in the world takes its name from Elihu Yale, a slave trader, who got his richness in colonial India.

Andrews Kehinde, who has British African-Caribbean background, considers that colonialism was another key ingredient of the empire of the West, since the colonies provided the raw materials to develop the industry and trade of the West economies. He provides numerous examples, among them, the British company Cadbury, which roots come from the nineteenth-century, producing Dairy Milk bars and chocolate bars, gets its raw material since its foundation from cocoa beans from Africa, Asia and Latin America and Caribbean. The farmers get a few pennies a day, while the company has built a multibillion dollar empire, whose annual revenues exceed \$3 billion. In 2018, The World Cocoa Foundation declared that it was a target to raise farmers above of \$1.90 a day. The success of the Cadbury company is also derived from the history of colonialism and genocide of Aztecs in Mexico, where originally comes from the cocoa beans.

Kehinde, who is a frequent contributor to The Guardian, UK Newspaper, affirms that by the end of the nineteenth century almost the entire African continent was under colonial rule. Now we use the term "underdevelopment" to describe Europe's involvement, because when European took control of the continent to enrich their respective countries, the infrastructure was only

developed to the extent of the needs of the “master mother land” to transport raw materials, in this sense they developed roads, railways and ports.

According to the contributor of BBC, CNN and other global Media, after the Second World War the initial version of the Western imperialism changed the way of working. The great European powers simply no longer had the resources to directly control and maintain their colonies. After the Germans lost in 1918 their colonies were divided up between the Allies. By 1920, although Europe still controlled most of the world, the US became the heart of the New Western Empire.

Kehinde, author of the book *Black to Black*, describes that the new age of empire functions on the basis of financial intervention, manipulate political agendas, impose “puppet governments”, intervene in foreign policies, tolerate corruption of political leaders in exchange of obedience to the West, destabilise countries through the CIA (Central Intelligence Agency), destroy social ties and divide communities through social, ideological, political or economical problems such as organise crime, terrorism, racism, migration and so on, control development in underdeveloped countries in line with Western’s interest, train and educate administrators and rulers that will care and promote Western interest in Western universities and around the world, empower local elites in representation for the West’s goals, grant legitimacy to pro-west governments and political parties, encourage “cooperation” with multinational and Western trade and abolish State controls.

The United Nations (UN), International Monetary Fund (IMF), World Bank and World Trade Organization all play their part in administering colonial logic and neo-colonialism. In the New Age of Empire, the “independent colonies” are administrated by local elites at the service of the West. For Kehinde, the West is not rich because its genius, democracy or capitalism. It is affluent, because it has expropriated wealth from the underdeveloped world: The rest is poor because the West is rich.

Article Received: 2023. 07. 11

Revised: 2023. 08. 04

Accepted: 2023. 08. 23



## 『라틴아메리카연구』(AJLAS) 편집규정

### 제1장 총 칙

- 제1조 (명칭) 본 규정은 한국라틴아메리카학회(이하 본 학회라 칭함) 학술지 편집규정(이하 본 규정이라고 칭함) 이라고 한다.
- 제2조 (목적) 본 규정의 목적은 본 학회가 발행하는 학술지의 질적 향상과 공정한 심사를 도모하여 학술 발전에 기여하고 본 학회 회원들의 권익을 증진하는 것을 목적으로 한다.
- 제3조 (기능) 본 규정은 본 학회가 발행하는 국영문혼용학술지 『라틴아메리카연구』(*Asian Journal of Latin American Studies*)의 발행과 관련된 제반 규칙을 정한다.

### 제2장 편집위원회

- 제4조 (설치) 본 학회의 학술지의 발행과 관련된 제반업무를 관장하기 위해 편집위원회(이하 본 위원회라 칭함)를 둔다.
- 제5조 (구성) 본 위원회는 편집위원장 1인과 편집이사를 포함한 20인 내외의 위원으로 구성된다.
- 제6조 (임무) 본 위원회는 본 학회의 학술지에 게재할 논문의 모집, 심사, 발행 횟수 및 시기 등 제반업무를 관장한다.
- 제7조 (위원의 선정) 편집위원장 및 편집위원은 학문분야별 다양성과 지역적 형평성 그리고 국제적인 지명도를 고려하여 별도로 정한 자격요건에 따라 이 사회의 승인을 얻어 학회장이 임명한다.
- 제8조 (위원의 임기) 편집위원장 및 편집위원의 임기는 2년으로 한다.
- 제9조 (개최) 편집위원회는 편집위원장 또는 편집위원 삼분의 일 이상의 요청에 의하여 소집된다. 사이버 편집위원회도 이에 준한다.

### 제3장 투 고

- 제10조 (투고자의 자격) 본 학회의 학술지에 투고하는 자의 자격은 다음과 같다.
- (1) 본 학회의 회원
  - (2) 본 학회의 회원과 공동의 저자
  - (3) 기타 본 편집위원회가 인정하는 자
- 제11조 (요령) 본 학회의 학회지에 게재되고자 투고하는 논문은 투고요령을 따라야 하며 이는 별도로 정한다.

### 제4장 심 사

- 제12조 (심사보고서) 본 학회의 학회지에 게재되고자 하는 논문은 소정의 심사를

거쳐야 한다. 심사결과는 별도로 정한 심사보고서를 이용한다.

제13조 (심사위원의 선정) 본 편집위원회는 본 회의 회원 중 박사학위 소지자로서 대학의 시간강사 이상의 자격을 갖춘 자 중에 해당분야의 학술적 업적이 탁월한 자를 고정심사위원으로 위촉할 수 있다. 또한 투고논문 주제에 따라 해당 전문분야의 심사위원을 위촉할 수 있다.

제14조 (심사위원의 임무) 심사위원은 심사를 위촉받은 논문에 대하여 본 편집위원회가 정한 양식에 따라 성실히 심사하고, 심사과정에 획득한 정보를 누설하거나 남용하여서는 안 된다.

제15조 (심사위원의 수) 한편의 논문에 심사위원의 수는 3명을 원칙으로 한다.

제16조 (익명성) 심사위원의 선정, 심사, 심사결과와 통보에 있어서 다음과 같이 익명으로 한다.

- (1) 심사위원을 선정하는 과정에서 편집 위원들에게 논문의 저자는 익명으로 하는 것을 원칙으로 한다.
- (2) 심사위원에게 논문의 작성자의 성명, 소속, 직위 등을 밝히지 않는 것을 원칙으로 한다.
- (3) 심사위원의 성명과 소속을 논문의 작성자에게 알리지 않는다.

제17조 (심사결과와 처리) 심사결과에 대하여 편집위원회는 별표 1에 정하는 바와 같이 결과를 처리한다.

제18조 (심사비의 납부) 논문의 투고자는 본 학회가 정하는 소정의 심사비를 납부하여야 한다.

**제5장 발 행**

제19조 (발행시기) 본 학회지는 2020년부터 연 3회 간행한다. 발간일은 2020년에는 2, 6, 10월의 말일에, 2021년부터는 4월 30일, 8월 31일, 12월 31일로 한다.

제20조 (게재료) 게재가 확정되면 투고자는 본 학회가 정하는 소정의 게재료를 납부하여야 한다.

**제6장 기 타**

제21조 (저작권) 투고된 논문은 반환하지 않으며, 『라틴아메리카연구』에 게재된 논문의 저작권은 본 학회에 귀속된다.

**제7장 부 칙**

제1조 (시행일) 이 규정은 2020년 5월 23일 개정, 발효되었다.

제2조 (개정) 이 규정은 편집위원회의 발의 또는 이사회의 발의에 의하여 개정된다.

제3조 (시행일) 이 규정은 2022년 4월 20일 개정, 발효되었다.

## 별표 1: 심사결과의 처리기준표

A(90-100): 게재 (편집상의 수정, 보완 포함)

B(80-89) : 수정 후 게재

C(0-79) : 전면수정 후 다음 호 재심

D : 게재불가

심사평			심사결과 처리기준
제1심사자	제2심사자	제3심사자	
A	A	A	(1) 편집상의 수정, 보완 후 게재
A	A	B	(2) 수정 후 게재 편집위원회에서 수정보고서 확인 후 게재
A	A	C	
A	B	C	(3) 수정 후 게재 편집위원회에서 수정보고서 확인 후 게재
B	B	A	
B	B	B	
B	B	C	(4) 편집위원회에서 수정보고서 심의 후 게재 혹은 추가수정 요구 or 다음호 재심 or 제4심사자 심사의뢰 ※ 제4심사자 심사의뢰 시 판정이 A나 B이면 수정보고서 심사 후 게재 혹은 추가수정 요구
A	C	C	(5) 다음호 재심
B	C	C	
C	C	C	

※ 다음호 재심 판정을 두 번 받은 논문은 게재불가(D)로 처리하여 추후 투고를 받지 않는다.

※ 다음호에 재 투고된 논문 심사는 편집위원회에서 심사자 수를 1인-3인으로 정한다. 통과기준은 다음과 같다.

1인 심사의 경우: A or B

2인 심사의 경우: AA or AB or BB (AC or BC의 경우 편집위원회에서 게재여부를 결정할 수 있다).

3인 심사의 경우: 위 표에 따라 심사 프로세스를 다시 진행한다.

※ 3인의 심사자 중 한 사람이라도 게재불가(D) 판정을 내렸을 경우에는 편집위원회 심의를 거친 후 사안에 따라 (4)나 (5)에 준해 처리하거나 최종 게재불가(D) 판정을 내린다.

최종 게재불가 판정을 받은 논문은 추후 투고를 받지 않는다.

※ (4)의 심사결과에서 당해 호 논문 수록을 위한 제4심사자 심사의뢰는 학술지 발간 일정에 지장을 주지 않는 범위 내에서 가능하다.

## 『라틴아메리카연구』(AJLAS) 연구윤리 규정

제1조 (목적) 본 규정은 한국라틴아메리카학회가 발간하는 학술지 『라틴아메리카연구』와 관련하여 모든 연구자가 지켜야 할 연구윤리로, 연구윤리 위반행위에 대해 정의하고 그 해당 유형을 제시함으로써 투고자들이 준수해야 할 연구윤리 의무를 명시하여 투고자들의 책임과 의무에 관하여 기본적인 원칙과 방향을 제시하는 것을 목적으로 한다.

제2조 (적용대상) 본 학회에서 발간하는 학술지 『라틴아메리카연구』에 투고, 게재되는 논문과 정기학술대회를 포함한 학회 주관의 모든 학술행사와 출판물에 제출되는 원고들을 대상으로 한다.

제3조 (연구윤리 개요)

- (1) 연구자는 각자 연구윤리를 준수할 의무가 있다.
- (2) 연구윤리의 범위는 연구활동, 연구비 집행, 연구결과 출판 등을 포괄한다.

제4조 (연구윤리 위반행위) 본 학술지에서 규정하는 연구윤리 위반행위는 다음과 같다.

- (1) 학문적 독창성 침해: 타인의 연구업적(아이디어, 연구내용, 연구결과)을 무단으로 도용하거나 표절 혹은 침삭하여 위조 및 변조하는 경우
- (2) 학문적 객관성 침해: 연구에 직·간접적으로 인용 혹은 사용되는 각종 문헌의 출처 및 데이터를 의도적으로 가공, 변조함으로써 학문적 객관성을 침해하는 경우
- (3) 부당한 저자 표시: 연구자 소속과 직위의 허위 기재, 연구에 기여하지 않은 연구자에 대한 저자 자격 부여, 정당한 이유 없이 공동연구자에게 저자 자격을 부여하지 않는 행위
- (4) 중복투고 및 자기표절: 동일 연구자가 타 학술지 혹은 단행본 등의 연구물 혹은 논문의 일부를 본 연구소의 학술지에 중복투고하는 행위
- (5) 기타 연구윤리 위반행위에 대한 제보가 있을 시, 본 연구소의 편집위원회에서 해당 제보가 타당성이 있다고 판단하는 경우

제5조 (연구윤리위원회 구성) 표절 행위가 드러날 경우 『라틴아메리카연구』 편집위원회는 사안의 경중에 따라 투고자에 대해 다음과 같은 제재를 가할 수 있다.

- (1) 편집위원회가 연구윤리위원회 기능을 겸하는 것을 원칙으로 한다.
- (2) 편집위원이 연구윤리 위반행위 의혹 당사자인 경우 연구윤리위원회에서 배제한다.
- (3) 편집위원회는 사안의 경중이나 전문성 제고 필요성을 감안하여 학회 임

원이나 외부 전문가를 연구윤리위원회에 추가 위촉할 수 있다.

제6조 (연구윤리 위반행위의 제보) 연구윤리 위반행위에 대한 제보는 다음 각 호와 같이 이루어질 수 있다.

- (1) 누구든지 구두, 서면, 전화, 우편 및 전자우편, 연구소 홈페이지 제보 등 가능한 모든 방법으로 『라틴아메리카연구』 편집위원회에 위반행위 제보를 할 수 있으며, 대리인을 통해서도 가능하다.
- (2) 제보 접수는 실명 제보인 경우에 한하는 것을 원칙으로 한다. 단, 익명의 경우에도 구체적인 부정행위의 내용과 증거가 제출될 경우에는 그 제보를 접수한다.

제7조 (연구윤리 위반행위 심의 및 소명)

- (1) 연구윤리 위반 의혹이 제기될 경우 연구윤리위원회는 2주일 안에 위원회를 소집하는 것을 원칙으로 한다.
- (2) 연구윤리위원회는 제기된 위반행위의 내용에 대해 심의하고 객관적 증거확보에 주력한다.
- (3) 제보자가 있을 경우 위원회는 신원을 노출시켜서는 안 되며, 제보자가 부당한 압력이나 불이익을 받지 않도록 충분한 조치를 취해야 한다.
- (4) 연구위반 행위 의혹 당사자에게 서면을 통해서 또는 연구윤리위원회 출석을 통해서 1차 소명기회를 부여한다.
- (5) 위원회는 부정행위 여부에 대한 검증이 끝날 때까지 피조사자의 명예나 권리가 침해되지 않도록 주의해야 한다.
- (6) 제보, 조사, 심의, 의결 등 조사와 관련된 모든 사항은 비밀로 하며, 조사 참여자 모두는 조사 과정에서 취득한 정보를 비밀에 부쳐야 한다.
- (7) 위원회는 본조사 결과를 피조사자에게 알리고, 판정을 내리기 전에 피조사자에게 충분한 소명기회를 최종 부여한다.
- (8) 위원회는 재적위원 3분의 2 이상의 출석과 출석위원 과반수의 찬성으로 결과를 확정된 후, 이를 제보자 및 피조사자에게 통보한다.
- (9) 연구위반 행위에 대한 조사결과는 학회 상임이사회에 보고되어야 하며, 해당 사안에 대한 연구윤리위원회의 모든 활동 및 증거, 소명자료, 참석자 현황은 기록으로 남긴다.

제8조 (연구윤리 위반행위에 대한 조치) 연구위반 행위가 드러날 경우 연구윤리위원회는 사안의 경중에 따라 투고자에 대해 다음과 같은 조치를 취할 수 있다.

- (1) 연구위반 당사자의 소속기관에 위반 사실을 통보한다.
- (2) 학술지 투고논문과 관련된 연구위반 사례에 대해서는 당사자의 논문투고를 향후 최소 3년에서 최대 5년간 제한한다.

- (3) 논문게재 이후에 연구위반 사실이 드러날 경우, 홈페이지와 회원 공지를 통해 이 사실을 알리고 『라틴아메리카연구』 디지털 아카이브에서 해당 논문을 삭제한다.
- (4) 한국연구재단의 학술지 관리 지침에 따라 재단에 조사결과를 통보할 수 있다.

### 부 칙

- (1) 『라틴아메리카연구』의 연구윤리 규정은 2008년 10월 1일 최초 제정, 발효되었다.
- (2) 현 연구윤리 규정은 2020년 10월 10일 개정되었다.
- (3) 본 개정안에 명시되지 않은 사항은 편집위원회에서 논의 후 결정한다.

## 『라틴아메리카연구』(ALAS) 투고요령

1. 한국라틴아메리카학회에서 발간하는 『라틴아메리카연구』는 라틴아메리카 지역에 관한 지역 연구의 성과를 공유하는 전문학술지이며 2011년부터 한국연구재단의 등재지입니다.
2. 본 학회는 회원과 이 분야에 관심을 가진 전문 연구자들의 기고를 환영합니다. 보내 주실 원고는 언어에 상관없이 다른 곳에 게재되었거나 게재될 계획이 없는 순수 학술논문이어야 합니다.
3. 게재 신청을 하실 논문의 연구 분야나 제목은 제한이 없으나 게재 여부는 편집위원회의 심사에 따라 결정됩니다.
4. 논문을 보내실 때는 원고작성 요령을 참조하시어 반드시 워드프로세서로 작성해서서 e-mail(lasak@naver.com)로 보내 주시기 바랍니다. 원고를 보내실 때에는 소정 양식의 논문투고신청서를 반드시 첨부하여 제출하여야 합니다.
5. 『라틴아메리카연구』는 연 3회 발간(4월 30일, 8월 31일, 12월 31일)되며 원고마감일자 없이 수시로 논문을 접수합니다. 논문게재는 원칙적으로 투고일자 순서로 되며, 늦게 투고되는 논문은 학술지 발간계획에 따라 다음호로 게재를 미룰 수 있습니다.
6. 논문게재가 확정되었을 경우 학회는 소정의 게재료를 징수합니다.
7. 학회지 기고에 관한 제반 문의사항은 한국라틴아메리카학회로 보내시기 바랍니다. 원고송달의 경우 궤봉투에 반드시 학회지 원고게재 신청이라고 명기해 주시기 바랍니다.

※ 원고 접수 이메일: lasak@naver.com

## 『라틴아메리카연구』(AJLAS) 원고작성요령

『라틴아메리카연구』에는 라틴아메리카와 관련된 모든 주제의 논문을 투고할 수 있습니다. 단, 이미 다른 학술지나 단행본을 통해 출판된 논문은 접수하지 않습니다. 논문작성언어는 한국어, 스페인어, 영어, 포르투갈어 모두 가능합니다. 논문 길이는 10,000 단어 이내와 원고지 기준 150매 이내로 제한합니다. 기준 분량 초과시 편집위원회는 분량 축소를 요구하거나 게재를 다음호로 미룰 수 있습니다. 논문 작성은 아래한글 혹은 마이크로소프트 워드를 사용해주시시오. 그림, 표, 지도, 그래프 등은 투고자의 의도를 존중하되 출판시의 제 문제를 고려하여 조정되는 경우도 있을 수 있습니다.

『라틴아메리카연구』는 또한 최근의 학술적 동향을 신속하게 소개하기 위하여 노트(Note)와 리뷰 에세이(Review Essay) 섹션을 마련해 놓고 있습니다. 이 두 섹션에 투고된 글은 심사를 거치지 않고 게재됩니다. 분량은 원고지 기준 40매 이상으로 최근 주요 이슈, 연구동향, 주목할 만한 연구서를 소개하시면 됩니다. 단, 주제나 게재 가능 여부는 편집위원회와 사전에 상의하시기 바랍니다.

### <원고작성 요령>

투고원고는 이전 학술지를 참고하여 제목, 성명 및 소속, Abstract, Keywords, 본문, (부록), 참고문헌의 순으로 작성하시기 바랍니다. 이를 준수하지 않은 투고논문은 반려합니다.

### 1. 제목

학술경비를 지원받은 논문의 경우 제목 맨 뒤에 \*표를 하시고 각주에 경비지원 내용과 과제번호를 밝힌다.

예) 이 논문은 2001년 한국학술진흥재단의 지원에 의하여 연구되었음  
(KRF-2001-002-A00255).

### 2. 성명 및 소속

성명 및 소속은 한국어로 작성한 논문은 한국어로, 외국어로 작성한 논문은 외국어로 표기한다. 소속 앞에는 단독 혹은 공동저작 사항을 표시한다. 맨 뒤에 \*표를 하고(학술비 지원논문의 경우 \*\*) 각주에 저자의 영문 소개를 덧붙인다. 외국어 이름을 표기할 때 이름을 먼저 쓰고 성을 나중에 쓰며, 이름 사이에는 하이픈("-")을 사용하고, 첫 글자는 대문자로 쓴다. 투고자의 e-mail 주소는 각주 저자소개 뒤에 쓴다. 공동저작의 경우 주 저자를 앞에 기타 저자를 주 저자 뒤에 쓴다.

예) 홍길동

단독/서울대학교\*

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### 3. Abstract

초록은 200단어로 영어로 작성한다.

### 4. 키워드

키워드는 5개 내외로 영어와 국문으로 작성한다.

예) Keywords: Political chaos, Ladino, Mayan aborigines, Obvention and contribution, Speaking cross / 정치적 혼돈, 라디노, 마야원주민, 종교적 세금과 부역, 말하는 십자가

### 5. 본문 주석: 약주 사용

- 1) 저자의 이름이 본문에 언급될 경우 괄호 안에 연도만 표시. 저자의 이름이 한 글일 경우 저자의 성을 영문으로 함께 표기.  
예) 홍길동은(Hong 1999) 세계화의 당위성을 강력히 지지한다.  
Drake(1966)는 이 조약이 헌법정신에 위배된다고 말한 바 있다.
- 2) 저자의 이름을 본문에 언급하지 않고 인용한 경우는 성과 연도 표시  
예) 세계화의 폐해를 주장하는 목소리가 커지고 있다(Fuentes 1979).
- 3) 인용 페이지를 밝힐 경우에는 ‘;’ 뒤에 페이지 표시  
예) 리오 회의에서도 세계화의 폐해를 지적한 바 있다(Hong 1983, 22-25).
- 4) 인용 책 혹은 논문의 저자가 둘일 경우에는 가운데 ‘and’로 구분.  
예) 리오 회의에서도 세계화의 폐해를 지적한 바 있다(Lagos and Fuentes 1983, 22).
- 5) 저자가 세 명 이상일 때는 ‘et al.’을 사용.  
예) (Alessandri et al. 1971, 217-221)
- 6) 인용문이 2인 이상인 경우에는 ‘;’로 구분  
예) (Lacan 1974, 45; Derrida 1977, 22-23)
- 7) 참고문헌에 동일인이 같은 해에 쓴 저작이 다수 포함되어 인용을 할 때 연도 표기만으로 구별이 되지 않을 경우 알파벳 소문자 사용.  
예) (Lacan 1974a, 45; Lacan 1974b, 22-23)
- 8) 재인용 방법  
예) Lacan의 말을 Derrida 책에서 재인용할 경우: (Derrida 1974, 45, 재인용)

### 6. 표와 그림

- 1) 각각 표 1., 표 2., 그림 1., 그림 2.로 표기하며 표 1.은 내용의 위에 그림 1.은 내용의 아래에 위치시킨다.
- 2) 표와 그림이 여러 부분으로 구성되어 있을 경우 각 부분을 a, b 등으로 표기한다.

## 7. 참고문헌

- 1) 참고문헌은 지면의 제약을 고려하여 가급적 본문에 인용된 것만 적는다.
- 2) 저자는 알파벳 순서에 따라 정리한다.
- 3) 동일 저자의 출판물은 오래된 것부터 연대순으로 배열한다. 같은 연도에 여러 편의 저술이 있을 경우 1999a, 1999b, 1999c 등으로 분류한다. 이때도 먼저 나온 것을 1999a로 삼는다. 동일저자의 출판물 중 단일저작과 공동저작이 있을 경우 전자를 후자에 앞서 배열한다.
- 4) 한국어 참고문헌과 논문 및 인터넷 자료도 영어로 표기하여 외국어 자료와 함께 정리한다.
 

예) Hong, Kil-Dong(2010), “Value of National Holidays in Mexico,” *Latin American Affairs*, Vol. 1, No. 2, pp. 1-33.

영문 참고문헌 정보가 제공되지 않을 경우 한국어의 발음을 알파벳으로 표기하고 괄호 속에 영문 번역을 병기한다.

예) Hong, Kil-Dong(2010), “Mexico Kukkeongilui Gachi(Value of National Holidays in Mexico),” *Jungnammi Yeongu(Latin American Affairs)*, Vol. 1, No. 2, pp. 1-33.
- 5) 단행본 - 저자(연도), 제목, 출판 장소: 출판사 명
 

예) Von Mises, L.(1983), *Nation-State and Economy: Contributions to the Politics and History of Our Time*, Leland B. Yeager(trans.), New York: New York University Press.

Strunck, W. Jr., and E. B. White(1979), *The Elements of Time*, 3rd ed., New York: Macmillan.
- 6) 저널 논문 - 저자(연도), 제목, 저널 이름, 권(Vol.), 호(No.), 페이지
 

예) Lipset, S. Ni(1983), “Radicalism or Reformism: The Sources of Argentine Working-Class Politics,” *Journal of Latin American Studies*, Vol. 77, No. 2, pp. 1-18.

\* ‘권’과 ‘호’ 표기법에 유의: 첫 글자는 대문자, 철자에 유의, 로마자 사용하지 않고 아라비아 숫자로.

\*\* 계절, 달, 날짜 등을 명기할 필요가 있을 때는 No.와 페이지 사이에 쓴다.

예) Lipset, S. Ni(1983), “Radicalism or Reformism: The Sources of Argentine Working-Class Politics,” *Journal of Latin American Studies*, Vol. 77, No. 2, March, pp. 1-18.
- 7) 단행본에 삽입된 논문 - 저자(연도), 제목, 편자, 제목, 출판 장소: 출판사, 페이지
 

예) Weber, M.(1984), “Legitimacy, Politics, and the State,” in William Connolly(ed.), *Legitimacy and the State*, New York: New York University Press, pp. 32-62.

- 8) 인터넷 사이트를 참고문헌으로 올릴 경우에는 인터넷 주소를 가장 뒤에 쓰고 마침표는 찍지 않는다. 인터넷 논문이라도 발간 연도를 아는 경우에는 저자 뒤에 연도를 밝힌다.

예) Ortega, Daniel(2001), “La histoirra inconclusa,” <http://www.danielortega.cl>

\* 기타 여러 가지 사항은 주석을 염두에 둘 것.

## 8. 외국어 표기

외래어표기법에 따라 표기하는 것을 원칙으로 하되 이미 우리말에 널리 사용되고 있는 것은 그에 준할 수 있다.

# Asian Journal of Latin American Studies

## Submissions and Review Process

Contributions to AJLAS are invited from all parts of the world. Articles may be written in English, Spanish, Portuguese, or Korean and they will be published in the original language. Each contributor will receive, free of charge, ten off-prints of the article and a copy of the issue of the Journal in which it appears. Manuscripts must be original research; AJLAS will not consider papers currently under review at other journals or that duplicate or overlap with parts of a book or larger works that have been submitted or published elsewhere. If there is doubt about whether the manuscript is acceptable, authors should discuss this issue in a cover letter to the managing editor. Review essays are also considered. Submissions are accepted on a rolling basis. Publication dates are April 30, August 31, and December 31.

## Instructions for Contributors

1. All contributions and editorial correspondence should be submitted to the journal:

Asian Journal of Latin American Studies  
Homepage: <http://www.ajlas.org>

Attn: Dr. Gyoung-Mo, Gu  
Busan University of Foreign Studies, Republic of Korea  
Email: [lasak@naver.com](mailto:lasak@naver.com)

2. Formatting of Manuscripts:

- Length: Manuscripts should not be longer than 10,000 words, including text, tables, figures, title page, and references.
- Style and Layout: Font size should be 'Garamond' throughout the work: text 10.5 point, footnotes 8.5 point.

- The entire paper should be double-spaced; please do not submit double-sided copies. All pages should be numbered sequentially.
  - Manuscripts should be ordered as follows: title page, text, abstract, keywords, appendices, references, tables, figure captions, figure pages.
  - Titles, subtitles, and text subheadings should be chosen for succinctness and interest. The title page should also contain the name, academic rank, institutional affiliation, and contact information (address, telephone, e-mail) for all authors. In the case of multiple authors, the title page should indicate which author will receive correspondence.
  - Submission Form: All submissions should include this manuscript submission form, available in Word or PDF format. An abstract (200 words) should be included with the submission form.
3. The electronic version of the manuscript should be submitted directly to the managing editor. Please submit properly-formatted electronic manuscripts (a single file containing all parts of the paper) in Microsoft Word.

#### 4. References and Citations:

In text, quotations must correspond exactly with the original in wording, spelling, and punctuation. Short quotations within the text should be noted by quotation marks; longer quotations or extracts should be indented from the left margin and require no quotations marks. Changes and additions to quotations should be identified by bracketing; ellipses [...] should be used to identify omissions; emphasis added should also be indicated. Embedded citations should be used, hence please do not use footnotes for simple citations. All citations should be specified in the text in the following manner:

- (a) If the author is named in the text, cite by year of publication:  
 ... Drake (1966) has suggested ...
- (b) If the author is not named in the text, cite by last name, and year of publication:  
 ... it has been noted (Fuentes 1979) that ...
- (c) If necessary, pagination should follow the years of publication separated by a comma  
 ... it is argued (Lagos 1983, 22) that by ...

- (d) Dual authors should be joined by 'and' multiple authors should be indicated by 'et al.':
  - ... other approaches (Snyder and Diesing 1977, 392) may assume (Alessandri et al. 1971, 217-221).
- (e) If an author has multiple references for any single publications year, indicate specific words by the use of lower case letters and separated by semicolons
  - ... the one hand (Lacan 1974a, 45; Lacan 1974b, 22) ...
- (f) Series of references should be enclosed within parentheses and separated by semicolons; items should be ordered chronologically, by year of publication, and alphabetically within any year:
  - ... proponents of the position (Russett 1981; George 1982; Holsti 1983; Starr 1983) and many ...

The reference section should begin on a new page following the text and any appendices. Works should be listed alphabetically by author, followed by a section listed alphabetically by institution - or title of any material not attributed to any specific author(s). References should conform to the following format:

- (a) References to books should list author(s), year, title, place of publication, and publisher:
  - ... Von Mises, L.(1983), *Nation-State and Economy: Contributions to the Politics and History of Our Time*, Leland B. Yeager(trans.), New York: New York University Press.
  - ... Strunk, W. Jr. and E. B. White(1979), *The Elements of Time*, 3rd ed., New York: Macmillan.
- (b) References to journal articles should list author(s), year, title of article, journal name, volume, number(s) and inclusive pages:
  - ... Lipset, S. Ni(1983), "Radicalism or Reformism: The Sources of Argentine Working-class Politics," *Journal of Latin American Studies*, Vol. 77, No. 2, pp. 1-18.
- (c) References to works in edited volumes should list author(s), year, essay title, volume editor(s), volume title, place of publication, publisher and inclusive pages:
  - ... Weber, M.(1984), "Legitimacy, Politics and the State," in William Connolly(ed.), *Legitimacy and the State*, New York: New York University Press, pp. 32-62.
- (d) References to monographs in a series should list author(s), year, title, series

title, place of publication, and publisher:

... Fromkin, M.(1986), *The Limits of Recognition, Sanger Series on Law and International Society*, New Haven: Sanger Publishers.

Page proofs will be supplied to the first author of a paper, but only errors in the type setting may be corrected at this stage. Any substantial alterations will be charged to the author(s). Consequently, the author(s) should ensure that the paper is submitted in final form. Proofs should be corrected and returned within seven days of receipt.

Manuscript Formatting Information

<http://www.ajlas.org/>

## Review Process

1. Initial Review: Upon receipt of the manuscript, the managing editor or other area specialist will make an initial assessment of the article and ensure that all required information for the submission process has been included. If any information is missing, the reviewer will contact the author.
2. Full Review: After the initial review is completed, an electronic version of the manuscript will be sent out to three reviewers. The authors will receive the reviewer's comments and have an opportunity to make corrections and resubmit.
3. Final Review and Publication: After authors revise and resubmit, the manuscript will undergo a final review prior to publication. The time from submission to final review and publication may be as little as two-three months to as long as a year. Publication dates are April 30, August 31 and December 31. Authors will receive ten off-prints and a copy of the journal in which the article appears.
4. Rejection: This may occur during either the full review or after the final review and publication. Authors will be notified as quickly as possible if their manuscript is rejected so that they may seek publication elsewhere.

## Code of Research Ethics

**Article 1** (Purpose) The purpose of the Code of Research Ethics is to establish ethical standards to be adopted by all contributors and required for publication in the *Asian Journal of Latin American Studies* (hereinafter “AJLAS”), published by the Latin American Studies Association of Korea (hereinafter “the Association”). The Code of Research Ethics defines what constitutes a case of misconduct and specifies by category different types of research ethics violations. In doing so, the Code of Research Ethics seeks to provide ethical principles and guidance regarding the duties and responsibilities of all authors, contributors, and members of our Association.

**Article 2** (Scope of Application) The Code of Research Ethics applies to all articles submitted to and published in AJLAS, as well as all manuscripts submitted for academic events and conferences organized by the Association.

**Article 3** (General Guidelines for the Code of Research Ethics)

- (1) All authors, researchers, and contributors are expected to follow the Code of Research Ethics.
- (2) The Code of Research Ethics applies to all research activities at all stages, including the publication process and the distribution of funding for members of AJLAS and the Association.

**Article 4** (Violations of the Code of Research Ethics)

AJLAS regards the following activities as violations of the Code of Research Ethics:

- (1) Plagiarism: Misappropriation of an original author’s ideas, intrinsic content, or research results without the acknowledgment or pre-arranged permission.
- (2) Fabrication and Fraud: Falsification, invention, or manipulation of qualifications, data, sources, results, or citations directly or indirectly used in research.
- (3) Authorship Disputes: Providing false information about a researcher’s affiliation or academic position, granting authorship to individuals who did not contribute to the content or results of the research, or

the failure to grant authorship of a manuscript to individuals who contributed to the content or results of the research, or who made relevant contributions, without justifiable reason.

- (4) Duplicate Submission and Self-plagiarism: Submission of manuscripts describing research results or elements that are essentially the same as those described in another journal or primary publication.
- (5) Other Violations: Any other reports of misconduct judged by the Research Ethics Committee of AJLAS as noticeable misconduct.

**Article 5** (Composition of the Research Ethics Committee)

- (1) The members of the editorial board of AJLAS shall serve on the journal's Research Ethics Committee.
- (2) Individuals with conflicts of interest related to any investigation shall be excluded from the Research Ethics Committee.
- (3) The Research Ethics Committee may consult or involve a Latin American Studies Association executive or an external expert in its decision making, dependent on the severity or nature of any violation.

**Article 6** (Reporting Violations)

Research ethics violations may be reported in the following ways:

- (1) The Research Ethics Committee may receive reports of misconduct by any available means, such as in writing, by phone, by mail, by email, or through the LASA website. It is acceptable for a proxy to submit a report of ethics violations.
- (2) Reports of misconduct should be made by an informant using his/her real name. Anonymous allegations of misconduct may not be considered. However, if specific information and substantiated evidence related to a claim of misconduct are submitted, anonymous reports will be accepted.

**Article 7** (Investigative Process and Vindication)

Research ethics violations may be reported in the following ways:

1. The Research Ethics Committee will convene and initiate an investigation within two weeks of any report of violations being filed.
2. The Research Ethics Committee is obligated to gather sufficient evidence of specific misconduct in order to verify the validity of the report.
3. Under no circumstances shall any personal information regarding the

person(s) who report violations be published. The committee should take all necessary measures to protect the informant from negative repercussions or possible external pressures.

4. The person(s) concerned will be informed of the allegation in writing or by meeting with the Research Ethics Committee in person. The committee shall ensure that the person(s) concerned are given an opportunity to express their opinions, objections, and arguments.
5. The Research Ethics Committee will keep confidential the identity/ies of the person(s) concerned and ensure that the person(s) concerned experience no infringement of their rights until the suspected misconduct has been verified.
6. All details of the investigation, including reports, deliberations, decisions, and suggested measures, shall be kept confidential. Individuals who take part directly or indirectly in the investigation shall not disclose any information during the execution of the investigation or related tasks.
7. The Research Ethics Committee shall notify the person(s) concerned of both the content and results of the investigation before the final decision is made. All parties and persons related to the allegation will be given sufficient opportunity to respond.
8. The committee shall notify the informant and the person(s) concerned after a decision regarding the investigation has been made by vote. For a vote to be executed successfully, more than two-thirds of the currently registered members and a majority vote of the members in attendance are required.
9. The results of the ethics violation investigation must be reported to the board of the Association, and all records, including relevant documentation, evidence, and lists of individuals involved, shall be provided.

**Article 8** (Measures after Verification) If it is determined by the Research Ethics Committee that there is an actual violation of the Code of Research Ethics, disciplinary measures will be taken based on the severity of violation. These are as the following:

- (1) The authors' institutions and sponsors will be notified of the violation of the Code of Research Ethics.

- (2) The authors will be prohibited from submitting manuscripts to any publication related to the Association and to AJLAS for three to five years.
- (3) Published papers will be removed from AJLAS and from the Association's digital archive and members will be informed of the reasons for this decision.
- (4) The results of the investigation will be reported to the National Research Foundation of Korea, according to that foundation's management guidelines for scholarly journals.

#### Addendum

1. This Code of Research Ethics took effect on October 1, 2008, when it was first established.
2. This Code of Research Ethics was revised on October 10, 2020.
3. Matters not specified in this Code of Research Ethics may be discussed and decided by the editorial board.

# Asian Journal of Latin American Studies

## Information regarding the Submission of Manuscript

### About the author:

1. Name:
2. Title and institution:
3. E-mail address:
4. Telephone number:

### About the manuscript:

1. Title:
2. Five Keywords:
3. Abstract (200 words):

### Submission date:

- \* I certify that the manuscript represents original and valid work and that neither this manuscript nor one with substantially similar content under my authorship has been published or is being considered for publication elsewhere. If requested, I will provide the data or will cooperate fully in obtaining and providing the data on which the manuscript is based for examination by the editors or their assignees.
- \*\* For papers with more than 1 author, I agree to allow the corresponding author to serve as the primary correspondent with the editorial office, to review the edited typescript and proof.
- \*\*\* Contributor's Qualification: All contributors must have at least a master's degree in order to submit a manuscript.
- \*\*\*\* More information about the formatting and submission of manuscripts is available at: <http://www.ajlas.org>



## The Asian Journal of Latin American Studies (AJLAS)

The Asian Journal of Latin American Studies (AJLAS) is an academic journal for discussion and debate on the subjects of Latin American affairs and comparative perspectives between Asian and Latin American Societies. The AJLAS has been published by the Latin American Studies Association of Korea (LASAK) since 1988. Published four times a year in February, May, August and November, AJLAS seeks to stimulate and disseminate research and scholarship in a broad sense of Latin American Studies. The scope of the AJLAS covers all areas in humanities and social sciences, including economics, political science, international relations, philosophy, history, sociology, geography, anthropology and literature. Articles with an interdisciplinary approach are especially welcome.

1986년 창립된 이후 한국라틴아메리카학회(Latin American Studies Association of Korea)는 국내 및 국제학술대회 개최와 학회지 발간을 비롯한 학술활동을 활발히 전개하여 왔다. 본 학회의 설립 목적과 그에 따른 실천사항은 다음과 같다.

첫째, 라틴아메리카 지역연구의 현안과제를 수행하며 학문의 사회성을 제고하기 위하여 현실문제의 접근을 꾸준히 시도한다.(예, 2000년도 국제학술대회 개최 “21st century challenge to Latin America and new perspectives”)

둘째, 라틴아메리카연구의 학제적 연구 풍토 조성 및 강화에 힘쓴다. 특히 현 단계 학문 특성에 맞는 학제적 연구 풍토를 진작시키는 한편 지역연구의 핵심과제인 비교연구를 촉진한다.(2004-2006년 학술진흥재단 프로젝트 “문화적 저항과 새로운 연대: 민주화이후 라틴아메리카의 인권”)

셋째, 세계화 추세에 부응하여 한국 라틴아메리카연구의 국제적 활동을 도모하고 학회의 세계적 위상을 진작시킨다.(예, 2007년 ‘범아시아오세아니아 라틴아메리카학회(CELAO)’ 행사 주관)

넷째, 라틴아메리카 지역 연구의 다양화 및 다변화를 추구한다. 연구인력의 분업화와 연구주제에 대한 심층적인 접근을 위해 각종 연구분과 위원회를 활성화하여 공동연구의 기반을 조성한다.(예, “인문사회분과”, “정치외교분과”, “경제경영분과”의 전공분야별 분과 세미나 운영)

이와 같이 한국라틴아메리카학회는 국내에서 라틴아메리카 지역연구를 체계적, 지속적으로 수행해온 유일한 전국적 학술단체이자, 라틴아메리카의 역사, 문화, 문학, 사회, 정치, 경제 등 모든 인문사회 학문분야에 있어 국내 최고의 학자들이 모인 전문가집단이다.

<b>학 회 안 내</b>	
학회 연회비 납부	우리은행 1002-563-092001 (예금주: 전주람) <ul style="list-style-type: none"> <li>• 연회비: - 정 회 원 5만원</li> <li style="padding-left: 20px;">- 종신회원 50만원</li> <li style="padding-left: 20px;">- 대학원생 3만원</li> </ul>
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학술지 논문 투고처 및 출판관련문의	울산광역시 남구 대학로 93 20호관 310호 울산대학교 스페인중남미학과(우편번호 44610) 전화: 052-259-2766 E-mail: lasak@naver.com Homepage: <a href="http://www.ajlas.org">http://www.ajlas.org</a>
학회 총무이사	조영현, 정상희, 강정원, 전주람 교수 대표 주소: 부산광역시 금정구 금샘로485길 65 부산외국어대학교 중남미지역원 (우편번호 46234) 전화: 051-509-5824 E-mail: lasakorea@gmail.com
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## 『라틴아메리카연구』 (Asian Journal of Latin American Studies)

### 편집위원회

#### ■ 편집위원장

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2023년 8월 30일 발행

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