

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

Carlos David Zavarce Velasquez\*

Tohoku University

### 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 promotor 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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\* Carlos David Zavarce Velasquez is a Assistant professor at the Graduate School of Law, Tohoku University, Japan. (zavarce@tohoku.ac.jp)

## 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

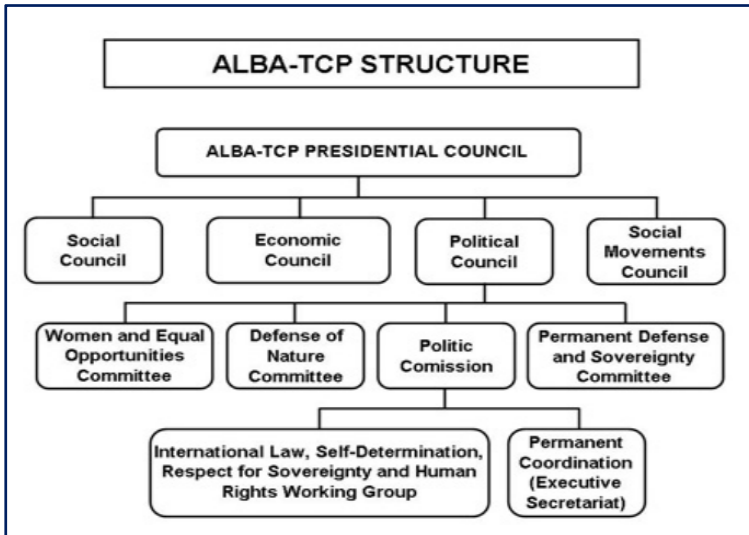
The most important political and decision-making instance is the Summit of Heads of State and Government. During the study period (1999-2013), twelve (12) regular summits were held, being Presidents Chavez (11 appearances), Morales, and Ortega (8 appearances each) the most active participants. Also,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

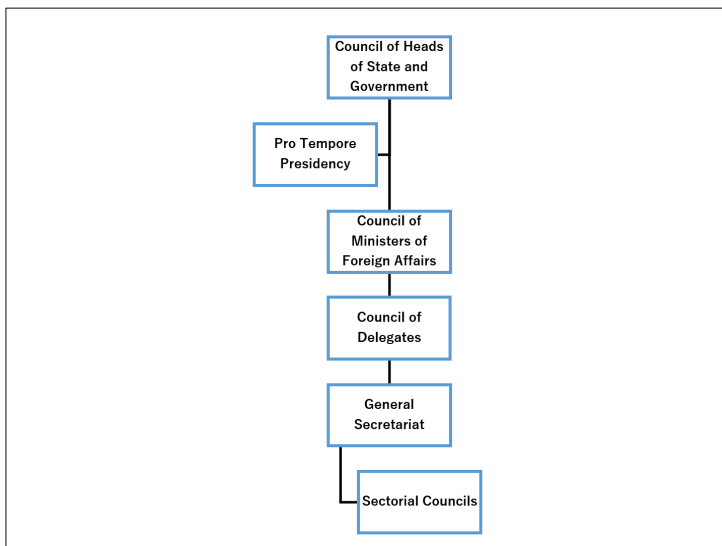
the U.S., a stand that was neither shared nor promoted by Brazil” (Borda, 2014. p.3).

### 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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