

**CIVILIAN MILITARISM, DEMOCRACY, AND STATE CAPACITY IN  
VENEZUELA AND COLOMBIA, 1998-2016**

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## ABSTRACT

How do elected leaders secure long-lasting political dominance of their factions, including transferring power to their successors? The existing literature has given limited attention to comprehending the strategies employed by presidents to secure lasting political influence, including the subsequent transition of power to close political allies upon the completion of their tenures. Notably, an important but consistently overshadowed pathway for achieving this goal is militarism. When integrated into political strategies, militarism can gradually erode democracy over time through a series of militaristic discourses, practices, and actions ostensibly aimed at enhancing deteriorated state capacity under presidents' political strategies.

This dissertation explores the relationship between political and military power in Venezuela and Colombia from 1998 to 2016, and the emergence and consolidation of civilian militarism as a by-product of this relationship. Despite both countries being governed democratically, they succumbed to radical political strategies – “Bolivarianism” and “Democratic Security”, respectively. Each gained immense popularity and had significant impacts domestically and internationally. The central argument of the dissertation revolves around the idea that militarism – and specifically civilian militarism – in Latin America is not a by-product of geopolitical competition, as suggested by the scholarship building on the work by Michael Mann and Charles Tilly; instead, it is a response to the pressure of economic changes wrought by neoliberalism and domestic circumstances aimed at enhancing state capacity to protect presidents' political strategies and goals.

Building on Mann's scholarship, civilian militarism is defined as the promotion of militaristic values related to war and preparedness for war by civilian elected authorities (political power). These authorities advance political objectives by encouraging various militaristic actions, attitudes, and societal norms. By drawing upon Mann's theoretical framework on sources of social power (political and military) and supplementing it with original contributions, this dissertation demonstrates that civilian militarism is wielded as a tool to bolster state capacities in alignment with the political objectives of presidents. Military power is assimilated as a means of infrastructural and despotic power, ostensibly to enhance state capacities and elected leaders' political goals. Nevertheless, if left unchecked, this approach poses a long-term threat to democratic regimes and can potentially blur the boundaries between political and military power, paving the path toward authoritarianism.

This dissertation makes a significant contribution to the understanding of the emergence and consolidation of civilian militarism within democratic contexts. It likewise contributes to the study of politics in Colombia and Venezuela, highlighting development that allowed elected leaders to retain political power, while also facilitating authoritarianism.

*This dissertation is dedicated to the loving memory of my dearest parents,*

*Flor María Hernández de Rodríguez (1945-2022)*

*Saúl Rodríguez Martínez (1950-2020),*

*My original mentors, sponsors,*

*and ultimate source of inspiration.*

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## INTRODUCTION

### Latin America: Between Social Laboratory or Fetish

*In spite of this, to oppression, plundering and abandonment, we respond with life. Neither floods nor plagues, famines nor cataclysms, nor even the eternal wars of century upon century, have been able to subdue the persistent advantage of life over death.*

Gabriel Garcia Marquez,  
*The Solitude of Latin America*<sup>1</sup>

Latin America is a region characterized by its diversity, gathering several countries with profound historical, cultural, and linguistic bonds. In a comparative analysis with other regions, Latin America, including Brazil (despite Portuguese), exhibits a remarkable degree of homogeneity. The region amalgamates cultural influences from three continents—the Americas, Europe, and Africa—that are evident and have coexisted since the 15th Century. Despite living under the historical influence of Western culture, Latin America maintains its unique identity, interwoven with the worldviews of indigenous and Afro communities.

While the region is often not considered a part of Western civilization due to its distinctive regional identity, it is essential to recognize its historical connections with the Western world, particularly in the unfamous transoceanic commerce during the first stage of globalization and the 19th century, when many countries in the region achieved independence from the Spanish crown under liberal values. Alain Rouquie (2012) coined the term "far-western" a couple of years ago, to capture the contradictions inherent in Latin America—it is simultaneously a part of Western culture and a component of the third world. This characterization places these countries in a unique position, existing in the middle range across various realms.

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<sup>1</sup> Nobel Lecture, 8 December, 1982, Available at <https://www.nobelprize.org/prizes/literature/1982/marquez/lecture/>.

In contrast to North America, countries in Latin America have struggled with the concurrent processes of state formation, nation-building, and democratic consolidation for centuries. Their journey has been tumultuous, aiming to integrate all segments of their societies, often marked by historical exclusion despite formal recognition through constitutions and laws since the early 19th century. Notably, Latin America emerged as one of the first regions globally to abolish slavery, extending freedom and citizen rights to diverse cultural and ethnic groups, albeit with varying degrees of intensity over the years (Halperin, 2005).

The region faced issues of multiculturalism and diversity centuries ago, although the outcomes were not always aligned with contemporary standards. As highlighted by Michael Mann, unlike settler societies that swiftly transformed into modern and liberal democracies by eradicating native communities, "more humane Latin American states had to cope with enduring racial-ethnic problems" for their political and social consolidation (Mann, 2002, 5). Consequently, Latin America faced the challenging task of managing diversity while at the same time building state capacity and democracy, a process often surrounded by various political forces that posed significant obstacles to this complex endeavor.

Latin America has become a captivating subject for social sciences studies due to its tendency to represent extremes in social phenomena, anomalies, or perceived shortcomings in various social and political processes. It is often viewed as a territory where perfection eludes, grappling with the challenges of democracy and development. Articles such as "Why Latin America Lost at Globalization—and How It Can Win Now" by Shannon K. O'Neil (2022) from the Council on Foreign Relations or "The Failure of (neo-) Extractivism in Latin America - explanations and future challenges" by Warnecke-Berger, H., Burchardt, H.-J., and Dietz, K. (2023), sometimes perpetuate these clichés without grasping the tough reality across the region.

Latin America, at the same time, has fulfilled a role as a kind of social laboratory to study various social phenomena, including democratic deepening, development, and social exclusion. However, it has also been utilized as a kind of fetish that reinforces stereotypes about the lack of agency, being seen as incapable of managing proper development. These stereotypes are sometimes attributed to immaturity or organizational deficiencies. This perspective often aligns with the notion of "black legends," portraying the region as hopeless or insignificantly impactful on the global stage (Malamud & Schenoni, 2020; Berger, 2022). The tendency to exoticize everything or dismiss structural conditions for certain political or economic developments further contributes to these narratives. It is essential to approach the study of Latin America with a nuanced understanding, recognizing its complexities and potential rather than succumbing to oversimplified narratives or negative stereotypes.

In the field of democratic deepening, Latin America has undergone a persistent struggle to defend civil rights, led by civil society against oppression and authoritarianism. This fight has been evident over decades, ranging from movements against dictatorships during the Cold War to contemporary endeavors advocating for democratic enhancement and defending social, environmental, and minority rights. The seed of democracy against authoritarianism has consistently sprouted among the people.

Despite Latin America being recognized as the most dangerous region for social or political activists globally, often facing the imminent threat of death, individuals continue to engage in the fight for justice and civil rights in remote and dangerous places. This challenges the prevailing notion of a "black legend" suggesting a lack of agency or insufficient will to combat oppression (McDougall, 2005). Contrary to this myth, people persist in resisting militarist projects led by those in power who, under the guise of democracy, seek to impose their worldviews. Sometimes successful, and other times not, these elected leaders wield

control over means of destruction (Mazzuca, 2010, 1). Yet, in the face of such adversity, people across Latin America have exhibited remarkable resilience, consistently contesting these projects and refusing to succumb to fatalism. This dissertation aims to explore the enduring spirit of resistance and resilience, examining how, despite the challenges, individuals continue to confront and challenge authoritarian impositions in the pursuit of democratic ideals.

## **Literature review**

### **Militarism**

The concept of militarism has permeated academic and political discourses since the early 20th century, seeking to elucidate an intensified influence of the military and its culture within political and social spheres. Alfred Vagts, a pioneer in this field, defined militarism as an "array of customs, interests, prestige, actions, and thought associated with armies and wars [that] transcending true military purposes [and] permeate all society" (Vagts, 1959, 13). Despite fluctuations in its prominence, scholars, activists, and policymakers at the turn of the new millennium have highlighted the resurgence of militarism. While challenging to discern, this phenomenon can have a significant impact on democratic regimes, serving as a potential pathway to authoritarianism.

Jean Dreze mentioned the corrosive impact of militarism on democratic relations, elucidating how this phenomenon, both in times of peace and war, detrimentally affects human rights, civilian liberties, the autonomy of political opposition, and mechanisms for holding elected leaders accountable (2000, 1175). In a recent exploration of militarism's role in consolidated and non-consolidated democracies, Anna Stavrianakis, Maria Stern, et al. (2018) concluded that this phenomenon negatively influences human rights and the political landscape, granting authorities excessive power beyond constitutional limits. Militarism, they argue,

extends beyond a mere accumulation of military force, impacting daily life and creating scenarios of insecurity that strain social and political relations (Stavrianakis & Stern, 2018). Similarly, Milan Zafirovski, employing a quantitative approach to analyze the correlation between militarism and democracy among OECD countries from 2010 to 2016, found that countries with high levels of militarism, as measured by military expenditure and propensity for involvement in conflicts, experienced a decrease in the quality of democracy compared to those without these traits. The increase in militarist indicators, he suggests, critically contributes to the resurgence of neo-fascism through right-wing populism and governments, particularly in historically fascist states, the United States, and countries outside the OECD, such as Brazil and Colombia (Zafirovski, 2020, 181).

Atsushi Koketsu points out that militarism has gradually entrenched itself into democracies, facilitated by civilian permissiveness, inadequate civil control over the military, and an excessive delegation of non-military duties to military institutions. Koketsu advocates for urgent civil supremacy to forestall potential militaristic adventures (2018).

Arguably, the most comprehensive approach to the study of militarism can be found in the scholarship of Mann. According to this author, militarism plays a critical role in shaping social and political order in various societies, providing legitimacy to the use of power and coercion (Mann, 1984; Mann, 1987; Mann, 2013). Despite the illusion of a decline in militarism attributed to the reduction in conventional wars globally, Mann contends that this phenomenon remains very much alive, albeit manifesting itself differently in the global south and taking alternative forms in the global north. In this context, Mann encourages the exploration of cases where diverse sources of power intersect in relation to militarism, even in seemingly peaceful scenarios (Mann, 2018). He regards militarism as a by-product of geopolitical competition, emphasizing its enduring presence even in times when there is no

explicit confrontation. This resonates with an appreciation of Martin Luther King's words during the Vietnam War era: "The evils of capitalism are as real as the evils of militarism and racism." (King, 1967, as cited in Borstelmann, 2001, 209).

### **Typologies of Militarism**

In attempting to capture the diverse manifestations of militarism, various concepts have emerged to encapsulate its multifaceted nature. Brayan Mabee introduces the concept of "liberal militarism," aiming to comprehend the paradoxical coexistence of liberal values and modernization with military and violent actions employed to achieve the objectives of Western countries (Mabee, 2016). Furthermore, in collaboration with Vucetic (2018), Mabee explores different forms of militarism, underscoring the value of this concept in elucidating the diffusion of militaristic values within civil society by the state. Thus, these varying types of militarism provide a lens through which to comprehend not only the significance of military power in modern society but also to scrutinize its critical role in social and political control.

While these conceptualizations offer valuable insights, they may not fully capture the complexities of domestic scenarios wherein incumbents may not be interested in foreign campaigns, and their decisions are not solely grounded in pure exceptionalism. Pioneering the use of the term "civilian militarism," Alfred Vagts focused primarily on bellicosity among civilians concerning geopolitical competition in the interwar period. He emphasized the glorification of the military and their values as being "above all other in the state" to ensure survival in the face of interstate warfare (1959, 453). This concept sheds light on the interplay between civilians and militaristic values during a specific historical period.

## **Militarism in Latin America**

In Latin America, the concept of militarism has been a subject of scholarly attention, reflecting the intermittent involvement of the military in political power. However, the academic exploration of this phenomenon has seen limited attention until recent years. Classic studies on militarism in the region initially perceived it as the military institution seizing political power, a scenario uncommon until the early 1960s. During this period, literature considered such takeovers as detrimental to democratic consolidation and disruptive to military professionalism (Lieuwen, 1963, 194). Another classic study viewed militarism as military involvement in domestic developmental plans, particularly in the fight against communism, encompassing civic-military activities such as health initiatives and infrastructure development (Sepulveda, 1970). Angelina Gutierrez (1978) examined militarism in the context of peripheral dependence concerning international capitalism, portraying it as a tool to safeguard the interests of global capital by selling weapons and protecting their investments across Latin America.

In recent years, there has been a revived interest in studying militarism and militarization in the region using both concepts in tandem. Notably, a brief and pioneer study explored militarism as a manifestation of populism, contending that it serves as a means to instigate transformative change within countries, often led by ruling elites with backgrounds as former soldiers from lower-income sectors, especially prevalent in left-wing governments undertaking radical projects (Stratfor, 2004). Rut Diamint's comprehensive study on the re-emergence of militarism, termed "new militarism" (2015), identifies it as the utilization of the military by political authorities in various activities, including domestic security. While differentiating between old and new militarism, the analysis has limitations in connecting this phenomenon to a broader contextual understanding.

Similarly, Francisco Verdes, in a literature review addressing the resurgence of militarism, links it to the remilitarization of the region under democratic governments. He characterizes the military as a "Swiss Knife," involved in almost all non-military activities but notes its detrimental impact on the democratic process. Verdes urges comparative research to identify the causes of the emergence and consolidation of militarism in Latin America (2019).

In a book chapter, Julio Rios-Figueroa retook the "new militarism" concept but linked it to the issue of the rule of law and democratic control of the military in recent years by the judiciary. The author stresses the relevance of properly supervising the behavior of the military when it has been used in multiple non-traditional roles, and when they have too much influence on the constitutional and legal-making process-making. The author suggests human rights abuses are a by-product of militarization, which can bring unexpected consequences for the rule of law (Rios-Figueroa, 2019).

In a joint editorial project, led by Hochmüller, Solar, & Pérez, and published in the journal *Alternatives*, several authors analyze the emerging phenomenon of militarism and militarization in Latin America. In the introductory article, these authors consider that "militarism is a theoretical and empirical phenomenon traveling back and forth between different geographies and realities," (2024) mentioning the impact of this phenomenon on families, societies, public security, management of violence, management of the environment, among others. The articles suggest several issues where militarization and militarism are present, but there is not a standard conceptualization or unique perspective to understand this phenomenon.

Considering one of the most critical concerns about militarization, Flores-Macías and Zarkin (2021) analyze in an article the militarization of law enforcement and how this phenomenon impacts the quality of democracy, undermines citizen security, human rights, police reform,

and legality. Using qualitative and quantitative data, the authors suggest several arguments based on general ideas that have been circulating in academia for years. Although they provide empirical evidence based on the Latin American experience, mainly focusing on Mexico, the authors attempt a theoretical approach. However, these analyses fall short in connecting their arguments to the broader phenomenon of militarism or militarisation, considering the contributions of other prominent scholars on the topic such as Mann, Enloe, Basham, or Shaw.

In this way, both classic and contemporary analyses of militarism and militarization in the context of Latin America have offered valuable insights for studying this phenomenon. However, these analyses, often brief in nature due to their characteristics as papers or chapters, consider the phenomenon isolated from broader social phenomena such as state formation, international relations, or domestic politics. Thus, these contributions fall short of connecting militarism with a broader perspective that considers its interactions with other phenomena. Moreover, discussions about causality, relationships with state capacity, and explanations regarding the emergence and consolidation of militarism remain either marginal or nonexistent in these studies regarding militarism and militarization, and particularly, in the context of Latin America.

### **Colombia and Venezuela Compared**

Despite Colombia and Venezuela both having democratic regimes from the mid-20th century to the early 21st century, comparative literature on these countries, despite their similarities, is limited. Some studies have explored political systems, particularly consociationalism, in both nations (Medina, 2005; Guerrero, 1998). Other research has focused on political parties there and the selection of presidential candidates (Martz, 2000); mechanisms of economic integration between the two countries (Milanese, 2007); and the political opposition's

response to democratic challenges led by Hugo Chávez and Álvaro Uribe (Gamboa, 2017 & 2022).

In this body of literature, few texts have explored military issues from a comparative perspective, with the majority concentrating primarily on civil-military relations. A pioneering study by Ana Maria Bejarano (2011) focuses on the democratization process in Colombia and Venezuela, examining the unusual subordination of the military in both countries compared to the regional standards. This subordination is attributed in part to the significant autonomy granted to the military, leaving both democracies vulnerable to the influence of this institution. Similarly, another study by Olga Illera highlights that civil-military relations have been crucial for local democratic stability in both countries. However, the analysis is more descriptive than analytical, discussing how Chávez and Uribe recently engaged the military in political discussions to bolster their prestige (Illera, 2008, 64). René de la Pedraja's work studies the relationship between the United States and several armies in Latin America from a historical perspective in the 21st century. Analyzing each country individually, the text shows how, during this period, military power dynamics created tension among these countries (2014, 89).

In the latest comparative literature, explicit discussions about militarism or militarization in Colombia and Venezuela are limited. However, within-case studies, particularly focusing on Venezuela, have shown a growing interest in this phenomenon. Ebert Cardoza establishes a historical connection between caudillismo in the past and militarism in present-day Venezuela, viewing this connection through the lens of excessive military intervention in politics (Cardoza, 2015). Another analysis suggests that both Chavez and Maduro utilized militarism as a pervasive social and political force, infiltrating almost every aspect of society and shaping economic, political, and social relations (Lucena, 2017). Jacome sees militarism

in Venezuela as the military's involvement in various societal realms transitioning from political control to economic control (2018).

Regarding Colombia, the study of militarism, at least within domestic Spanish-language academia, has been marginal, with more production in North American academia. Some literature explores how legal and illegal armed groups use militarism to control territories and people in the peripheries (Ramirez, 2019). Using the concept of "risk-transfer militarism," coined by Martin Shaw, a group of authors considers that local authorities accept handling military risk, particularly in the war on drugs. This form of militarism is seen as a strategy delivered from the global North to mitigate negative consequences originating from the global South (Smith, Hooks & Lengefeld, 2014).

Studies on militarism have often focused on providing explanations, with the global North contributing many concepts, including the works of Vagts (1959), Mann (1984; 1987; 2013), Enloe (2013), Vucetic and Mabee (2018). However, these studies have been less successful in establishing relationships with other phenomena such as political power, the state, or democracy as a regime, both for the global North and the global South. Mann stands out as an author who transcends this limitation. While the literature discusses the presence of militarism, especially in recent times, including emerging academic production discussed above on militarism and militarization in Latin America, it tends to be more descriptive and less ambitious in its theoretical scope. In this respect, this dissertation aims to fill this gap by examining the cases of Colombia and Venezuela at the turn of the new millennium, while also connecting with other phenomena to try to understand the complexities of militarism in a broader perspective.

These two countries serve as perfect cases for this study. Both experienced the presence of militarism, featuring political presidents with different ideologies. One country was at war,

while the other was not, yet both share a historical and cultural background as neighboring countries. Additionally, while Venezuela possesses one of the richest natural resources on earth, Colombia depends on other goods and industries. Through a comprehensive examination of these cases, this dissertation seeks to contribute to a deeper understanding of the emergence and consolidation of militarism in domestic realms, providing a more nuanced and theoretical exploration of this complex phenomenon.

In this context, my intention is to address the gap in the study of militarism through a comparative examination of the cases of Colombia and Venezuela. However, I aim to go beyond merely analyzing this phenomenon. Instead, I seek to position this research within a broader academic concern, specifically related to studies of democracy and state consolidation.

In a recent book, Laura Gamboa suggests a decline in the risk of military coups worldwide, however, she highlights contemporary autocrats employ legal and gradual strategies to undermine democracy like never before. Thus, her analysis focuses on how political opposition uses institutional and moderate extra-institutional strategies to prevent the erosion of democracy (Gamboa, 2022, 20). However, this analysis pays limited attention to the strategies employed by incumbents to retain political power in the long term and particularly the role of military. Similarly, Lührmann and Lindberg identify a third wave of autocratization, where elected leaders legally access power and gradually undermine democracy without abolishing key democratic institutions (2019). Yet, there remains a gap regarding the role of these leaders and the use of military power to achieve their goals, which poses also a challenge to democracy.

Similarly, there is a growing interest in the discussion about state capacity, recognizing coercion as an essential element for achieving governability (Mazucca & Munck, 2014).

However, few studies have explored how the use of coercion and military power can contribute to state consolidation while simultaneously deteriorating democratic quality. Thus, this dissertation aims to contribute to these discussions by exploring civilian militarism as a tool employed by elected leaders within political strategies to consolidate state capacity during turbulent times. Simultaneously, it intends to examine how civilian militarism, when utilized to retain political power, can erode democratic quality in the process.

### **The Argument in Brief**

What are the political and social dynamics that either hinder or foster the emergence of militarism? How does militarism influence political regimes and societies? What is its interaction with both domestic and international spheres? How does the state relate to militarism? Can militarism serve as a strategic tool for retaining political power within democratic regimes? These are thought-provoking questions and reflections stemming from the literature review. This dissertation aims to address them, utilizing the cases of Colombia and Venezuela from 1998 to 2016 as exemplary instances. In these cases, the interplay between political and military powers contributed to the rise of militarism, endorsed by civilian leaders and supported by substantial segments of their societies, called civilian militarism.

The fundamental research question this dissertation seeks to answer is: *What types of interactions between political and military powers facilitated the emergence and consolidation of civilian militarism in Venezuela and Colombia from 1998 to 2016?* While the response might seem simple initially, it will unfold as an intricate exploration encompassing details, causal relationships, and interactions among sources of power and various actors. This analysis will involve a multivariate examination of the interplay between structural elements, contingency, and agency. Each chapter will unravel the trajectory of how

civilian militarism emerged and solidified over the years. Operating under the guise of democratic regimes, the aim is to explain how the absence of adequate constraints from democratic institutions and civil society contributed to authoritarian consolidation. This phenomenon is particularly evident in Venezuela despite recurrent waves of violence in Colombia, which could make this country more prone to authoritarianism.

Thus, civilian militarism, as conceptualized in this dissertation, entails the glorification of war and the military, coupled with the readiness to prepare for war against diverse perceived enemies. This, along with varied militarist actions, procedures, and attitudes directed by elected authorities, aimed to enhance deteriorated state capacity due to the impact of neoliberal reforms. These actions collectively fulfill a set of goals aimed at retaining political power for the ruling factions. However, it is crucial to note that this exertion of power has had a detrimental impact on the democratic quality of already fragile democracies.

Each elected leader, particularly Hugo Chavez and Alvaro Uribe, executed a distinct political strategy—Bolivarian and Democratic Security, respectively—where military power served as a foundational element, playing a pivotal role as a source of infrastructural and despotic power. However, there were variations between each political strategy. Under Chavez and Maduro, the political strategy had a re-foundational character, while in the case of Colombia, it aimed to overcome defiant forces against the state and impose a particular worldview in a country entrenched in internal armed conflict, utilizing a militarist component. In both instances, there was a deliberate intention to utilize military power to augment state capacity through coercion and institutional capabilities, yet this came at the cost of abuses against citizens and democratic principles.

This dissertation will explore the inherent contradiction between the use of coercion within democracies and the necessity of employing this for the purported benefit of state

consolidation. This dilemma sparks a contentious debate in Latin America, given vulnerabilities in both state capacity and democracy.

While militarism is traditionally viewed in the literature as a by-product of interstate competition that facilitates increased state consolidation, my argument in this dissertation, particularly in the cases of Latin America, Colombia, and Venezuela, is that militarism primarily emerged due to domestic factors. These factors, driven by elected leaders, contributed to the consolidation of this specific form of militarism within the region.

Civilian militarism, embedded in an elected leader's belligerent rhetoric condemning perceived enemies of the country, facilitated the transition to authoritarianism. This shift was justified under the guise of rescuing these nations, although in Venezuela, it resulted in the pervasive influence of military power across all sectors of society. Military power was wielded as a source of infrastructural power, coercing people into submission under a militaristic atmosphere and glorifying the military. Consequently, elected leaders' projects were portrayed as the ultimate solution. However, the use of military power as a tool of coercion morphed into a source of despotic power, leading to abusive and horrendous actions that adversely impacted ordinary people, as explored in this study through instances such as the death of innocent civilians and control over access to essential resources like food.

This dissertation incorporates analyses that present arguments about the intricate relationship between the consolidation of state capacity and the erosion of democracy in the context of civilian militarism. Recent literature on democratic backsliding has often overlooked the dynamic interaction between political and military power. Gamboa briefly mentioned that executive power with military support can be more confident in using different strategies to stay in power, but the analysis does not delve deep into this topic. Despite her interest in how political opposition uses different strategies, she is short in explain in detail how opposition

tried to use military power to support their cause (Gamboa, 2022, 32). Lührmann and Lindberg (2019) concluded in a well-known article that the breakdown of electoral democracies is subtle and progressive, led by elected leaders in recent years, who use different strategies to maintain political power. However, while they mention the decline in military coups in the process of autocratization, they do not discuss how the support or instrumentalization of military power can be part of this process.

Haggard & Kaufman (2021) marginally mentioned that in the process of democratic backsliding, autocrats have access to military power as a resource that favors their control of political power, but they do not provide any further explanation about how military power interacts in this relation. In this respect, Balderacchi has suggested that parties and state coercive capacity provide some support to keep elected leaders in political power for a while (2018). However, he did not explore into this issue and how this is useful for maintaining power over time. Even in an already classic article about democratic backsliding, Bermeo overlooks the analysis of military power and how this can be critical for deterioration of democracy by elected officials (2016).

Thus, considering this literature and the findings of this dissertation, civilian militarism can be perceived as a strategy to retain political power. However, conventional analyses of democratic backsliding overlook this issue, and at the same time, the analyses about militarism often isolate this phenomenon without exploring the close relationships between state, political power, and military power, neglecting more complex correlations or causality in the transition from democracy to authoritarianism. In this regard, Colombia and Venezuela offer a unique opportunity for comparison in this respect. Both were functioning democracies, albeit fragile, until recent years when leaders with radical political strategies emerged. The international atmosphere fueled a certain level of dispute between these

countries, and more importantly, while one was governed by left-wing leaders leading to chaos and authoritarianism, the other country navigated under right-wing leaders who transitioned from an internal conflict to a more consolidated democracy, integrating radical actors into the democratic process, albeit with the continuation of fatal consequences against dissent activists and political leaders.

### **Dissertation Plan**

The dissertation is structured into six chapters. The initial chapter explores the theoretical and methodological foundations, underscoring the importance of an interdisciplinary approach that integrates comparative politics, historical sociology, and military sociology. This elucidates the characteristics of civilian militarism, drawing on the contributions of Mann and his theoretical framework, addressing criticisms, and introducing the dissertation's original contributions. These include the concept of civilian militarism, the role of military power as both infrastructural and despotic power, and the emergence of civilian militarism within the contradictions of neoliberalism and domestic circumstances.

The second chapter delves into the dilemma of augmenting state capacity versus democratic consolidation in Latin America, with a focus on the role of coercion. This examines the distinctive characteristics of Colombia and Venezuela as stable democracies during the Cold War, the impact of economic deterioration and crises in the 1980s, and the erosion of state capacity propelled by neoliberal reforms. This erosion is explored in light of its contradictions, particularly the dismantling of state capacity and the ambivalent discourse of the free market versus the ban on hard drugs under moral and political considerations.

The third chapter focuses on the analysis of civilian militarism as a tool for retaining political power. This section underscores the role of presidentialism in its establishment, highlighting the consolidation of political strategies through decisionism. It also examines the interaction

between these strategies and military power to justify domestic confrontations. The chapter also traces the evolution and consolidation of these political strategies over time, encompassing discussions on presidential re-election, the accumulation of political capital, and the continuation of political strategies leading to the transmission of power to political heirs.

The fourth chapter elucidates the utilization of military power as a source of infrastructural and despotic power. This explores both formal and informal mechanisms employed to involve military power in incumbents' strategies. The charismatic appeal of figures like Chávez and Uribe is highlighted, along with the analysis of the professionalization of the military in Colombia and its politicization in Venezuela. The chapter also examines the impact of these dynamics on the governments of Maduro and Santos. While one transitioned toward authoritarianism, the other engaged in a peace agreement with the FARC, contributing to the deepening of democracy.

In the fifth chapter, this dissertation analyzes how civilian militarism, while significant in fueling an arms race between Colombia and Venezuela, was not the sole determining factor for this phenomenon. This chapter explores how regional geopolitical competition was overshadowed by domestic security concerns. It explores the impact of competition between Russia and the United States in both countries, addressing domestic security issues under civilian militarism. Despite civilian militarism fostering a warlike discourse, this was not sufficient to instigate a war between Colombia and Venezuela. This section emphasizes the role of shared identity in preventing interstate conflict, challenging the democratic peace perspective on the absence of interstate wars in Latin America.

The sixth chapter analyzes, from a micro-level perspective inspired by military sociology, how civilian militarism affected democracy in both countries, creating a militaristic

atmosphere detrimental to democratic processes through certain actions and procedures. The creation of a special military service program in Colombia and Venezuela is discussed, along with the emergence of shadow forces (*Colectivos* and *Aguilas Negras*) fostered by the militaristic atmosphere. The adverse effects of civilian militarism on democratic processes, including its impact on food distribution in Venezuela characterized by military involvement, and the use of despotic coercion in Colombia resulting in the death of innocent people, are examined. Repression is also explored as a mechanism employed by these democratic regimes under civilian militarism.

Finally, taking into account the recent events regarding the territorial dispute between Venezuela and Guyana concerning the Essequibo region, in the conclusion, I will discuss some of the implications of the arguments in this dissertation. I aim to interpret these recent events from the perspective of the likelihood that civilian militarism can dangerously transition to geopolitical militarism when utilized in the domestic realm as a political smokescreen.

In conclusion, this dissertation makes a significant contribution to understanding the emergence and consolidation of militarism within democratic contexts led by elected leaders, referred to as "civilian militarism." By scrutinizing how these presidents employ political strategies and military power, the research highlights the propensity of these strategies to undermine democracy and alter the dynamics between political and military power in response to varying circumstances. Moreover, this comparative study fills a critical gap in the literature by shedding light on two case studies, Colombia and Venezuela, which have been relatively understudied despite their intrinsic significance and relevance. It also challenges prevailing notions by suggesting that militarism, in this case, civilian militarism, is not merely a consequence of regional geopolitical competition, as Mann suggests, but

rather a result of capitalist adjustments in the regional context and domestic dynamics more than the predominance of interstate competition.

Last but not least, this dissertation employs a qualitative research approach drawing on primary and secondary sources, including government and military documents, political magazines, and online documents to analyze these complex phenomena based on the contributions of comparative studies (comparative politics, historical sociology, and military sociology), which will be explained in detail in the next chapter.

## **CHAPTER 1 THEORY AND METHODOLOGY**

### **1.1 Introduction**

In this chapter, I will elucidate the principal components related to the theoretical and methodological framework employed in this dissertation. This encompasses a succinct exploration of the multidisciplinary approach, grounded in historical elements, utilized for the examination of political and military powers, civilian militarism, and, in brief, state capacity and democratic issues integrated into this interaction. Subsequently, a more in-depth exploration of Michael Mann's perspective on sources of social power, state dynamics, and despotic and infrastructural powers will be undertaken. The central theme of this dissertation is militarism, with Mann being a pivotal figure in this analytical endeavor. He stands out as one of the few scholars who recognize the significance of the military and militarism as critical forces in shaping modern and contemporary societies, interconnected with expansive networks of power diffused throughout societies. Mann transcends the conventional viewpoint found in civil-military relations studies, which predominantly focus on the interaction between civilian authorities and the military, particularly the ideal subordination of armed forces to elected authorities (Brooks, 2019), offering a more holistic perspective.

Mann's approach, in comparison to earlier works on militarism, such as Alfred Vagts' classical study (1958), is intricate and includes a macro-social and long-term outlook on the subject, an aspect often overlooked by other scholarly works, including the pioneering work of Cynthia Enloe (2013). While Enloe's work is equally captivating and influential, it is not completely appropriate to study the intricacies of militarism in Colombia and Venezuela during the turn of the new millennium regarding their relations with political power. As Vucetic and Mabee comment about Mann's work, they suggest that a thorough understanding

of modern society necessitates "sustained attention to militarism," encompassing not only war preparedness but also the utilization of military power and other strategies to maintain political control. These scholars posit that Mann's perspective explores how militarism is intertwined with the analysis of social and political order, often manifesting within society with the complicity of state agents (Vucetic & Mabee, 2018).

In this chapter, firstly, I will expound upon the multidisciplinary approach adopted in this dissertation, illustrating the connections between disparate perspectives based on disciplinary differences. Secondly, I will scrutinize the theoretical tenets crucial to this dissertation from Mann's perspective. Thirdly, I will explore alternative concepts that, while conceivable, are not expedient for this analysis. Fourthly, I will briefly introduce certain contributions of this dissertation concerning the theoretical approach. Finally, the methodology employed in this dissertation will be presented.

## **1.2. Comparative Politics, Historical Sociology, and Military Sociology**

In an era marked by hyper-specialization within the social sciences, the task of discovering perspectives that embrace a multi or interdisciplinary approach, openly acknowledging the contributions of various social sciences in their scholarship, has progressively become more challenging (Vienni-Baptista, et al., 2022). Despite sharing a common origin and focusing on the same object of study—human society—social sciences have, over time, demarcated their disciplinary boundaries to establish credibility. While this professionalization process has its merits, it has sometimes limited the inclusion of diverse approaches for analyzing the human experience.

Political science, in its pursuit of scientific rigor, has sought separation from sociology, and both disciplines, in certain variants, have tended towards ahistoricism (Prasad, 2016, 107). History, often perceived as laden with superfluous details, dates, and characters, has been

associated with elements of boredom and storytelling, traits that some social science scholars endeavor to distance themselves from in their pursuit of credibility within their respective fields (Gerring, 2012). It seems that certain practitioners of social sciences may veer towards researching above reality, occasionally overlooking the temporal dimension and the profound influence of historical structures on human behavior.

Collins suggests that scholarship is a collective enterprise aimed at unraveling the logic of human experience (2006, 19). In light of this, incorporating tools and perspectives from various disciplines becomes essential and enriching. Consequently, all social sciences are not only interconnected due to their common origin but also because they engage with the same object of study. In this dissertation, I intend to adopt a multidisciplinary approach, drawing on elements from different social science perspectives, particularly within a qualitative framework. The aim is to demonstrate that multiple points of convergence among social sciences, when utilized collectively, can enhance the analysis of complex phenomena such as militarism in Colombia and Venezuela.

The initial and most proximate perspective employed in this dissertation is that of comparative politics, which is considered a sub-field of political science. Its primary objective is to compare diverse political realities, prompting the recurring question within this scholarship: why compare? According to Giovanni Sartori, the primary goal of comparison is to glean insights from others' experiences, thereby contributing to the evaluation and understanding of one's own political reality (1991, 245). In his seminal article, David Collier asserts that comparison in political science serves to enhance knowledge by leveraging its capacity to describe and formulate concepts through the identification of similarities and contrasts among different political cases (1993).

While the sub-field of comparative politics has evolved over the years, its fundamental principles remain rooted in the classical description articulated by Howard Wiarda in a classic textbook: "the systematic study and comparison of the world's political systems; it seeks to explain differences between as well as similarities among countries [...] is particularly interested in exploring patterns, processes, and regularities among political systems" (2000, 7). Discussing the state of comparative studies at the turn of the new millennium, Wiarda noted that this sub-field, once hailed as the queen of political science, had experienced a diminished relevance. This decline was attributed to a waning interest in studying grand systems debates, such as capitalism versus communism, democracy versus authoritarianism, among others (Wiarda, 1998). Nevertheless, despite the perceived diminishment, comparative politics remains vibrant. A renewed interest has emerged, driven by contemporary challenges related to democracy, the economy, and state consolidation, which will be elucidated in this dissertation.

Philippe Schmitter, a distinguished figure in the field of comparative politics, has highlighted two primary objectives of this sub-field. Firstly, it seeks to generate knowledge about power relations by meticulously observing and analyzing a multitude of similarities and differences. This analytical approach allows for the inference of causality, revealing how distinct variables contribute to disparate outcomes. Comparative politics, in this sense, serves as a compensatory tool for the absence of laboratory experiments to compare and contrast social and political phenomena. Secondly, Schmitter emphasizes the practical objective of comparison, aiming to provide "useful descriptive information about how politics is conducted in different countries" within a specific domain. Through comparative politics, one can discern analogies and differences, enabling a nuanced understanding of power relations in diverse countries and political systems. Consequently, the comparative approach

yields a depth of knowledge that the study of a singular case may not easily produce (Schmitter, 2016).

In alignment with this perspective, Mahoney underscores that the primary strength of comparative politics lies in its ability to generate or refine hypotheses and concepts for describing and analyzing political reality. This is particularly achievable through a qualitative approach, wherein scholars, through in-depth case analyses, can discern similarities and differences by exploring the subtle details of political phenomena—a task often challenging within quantitative approaches (Mahoney, 2007). The qualitative orientation of comparative politics underscores the necessity of exploring specific cases to draw inferences and establish causal relations.

In this regard, many influential works in comparative politics trace their roots to historical sociology studies. This subfield within political sociology aims to investigate change over time by comparing multiple cases, with a particular focus on significant structural processes. The distinction between history and historical sociology lies in the utilization of theory and models in the latter, whereas the former, while employing concepts, endeavors not to oversimplify social or political reality through explicit models or theories. Historical sociologists explore major themes such as modernization, democracy, and authoritarianism, leveraging comparisons to illustrate variations among cases over the years. Joseph Bryant, in his examination of Mann's contributions, underscores how historical sociologists recognize the imperative of a multidisciplinary approach to studying social and political issues. According to Bryant, history alone is insufficient for understanding collective human actions, and social science, in isolation, cannot provide coherent explanations. Thus, he asserts that "the mutual engagement of history and sociology is an analytical prerequisite for keeping in focus the simultaneity that determines the social constitution of historical events and

processes, and the historical transformation of the agents, institutions, and cultures that constitute the fluxional realities within which 'history/social life' is made" (Bryant, 2006, 71). Historical sociology operates by offering explanations grounded in multicausality, entailing a comprehensive analysis of historical data. For Mann, sociological theory cannot progress without history, and vice versa; they are mutually complementary. Expressing this symbiosis, he suggests that "too much scholarly attention to the facts makes one blind; too much listening to the rhythms of theory and world history makes one deaf" (Mann, 1986, viii). Consequently, the enterprise of historical sociology centers on the analysis of significant topics and questions that other approaches find challenging to study due to difficulties in observing multiple cases in detail and the substantial volume of information generated in the research process.

Despite debates about whether historical sociology should exclusively focus on contemporary societies, the impact of structures and historical waves necessitates the examination of even distant times for certain topics. Missing the historical component makes it impossible to comprehend variations. The consideration of history has been a recurrent theme in social sciences discussions for years and proves challenging to overlook in the analysis of social phenomena (Mahoney, 2009). Historical sociology assumes a pivotal role in elucidating social change over time, complemented by the comparison of political systems that enables the extraction of causal inferences, as advocated by the perspective of comparative politics. Both these lenses are indispensable for this dissertation, particularly in the exploration of military issues. However, this exploration extends beyond the conventional realms of civil-military relations and military history. Recognizing the significance of military power is paramount in comprehending the genesis of militarism. Under Mann's framework, military power is

viewed as an autonomous source of influence, characterized by its distinct dynamics (Mann, 2006, 352).

Considering this perspective and aiming to embrace a multidisciplinary approach, it is prudent, in my view, to incorporate the insights of military sociology. Despite waning popularity, the study of military sociology remains crucial, especially given the importance of understanding the military's role within democratic frameworks and the necessity for effective control over their actions (Resteigne, 2022). In this context, military sociology provides a perspective to comprehend the complexities of military power and its interaction with political power. It contributes micro-level perspectives that form the basis for arguments about the workings of civilian militarism within the political strategies of incumbents, in tandem with military power. As outlined by Scott, Modesto De Angelis, and Segal, military sociology encompasses "the study of the military as an institution and of the interconnections between it and the society in which it is located, [and] organization and of individuals within the military" (2022, 24-25).

Therefore, the perspective of military sociology proves invaluable in this dissertation, offering insights into the transformations occurring within military power in response to evolving societal dynamics. The internal dynamics of military institutions and the leaders involved in wielding lethal coercion create a complex interplay with broader societal changes, resulting in an ongoing action and reaction. Thus, military power, being a potent force, can shape beliefs when interwoven with political power, as I aim to demonstrate in this dissertation. They are not a passive entity; rather, it is an organization with distinct characteristics, such as control and the ability to employ violence, which exerts a profound impact on society and the political realm. In Mann's words, "If you resist, you die." The

lethality associated with military power evokes fear among other sources of power and actors when they act autonomously or are sponsored to do so.

In this regard, a multidisciplinary perspective serves to enrich the analysis and comprehension of militarism by drawing upon the contributions of comparative politics. This field aids in the examination of political systems and their interrelations with diverse networks of power. Employing an analysis of small-n cases facilitates the identification of differences and similarities, essential for discerning causality. Historical sociology contributes with tools to capture the broader picture of the phenomenon, delving into historical contexts and examining detailed similarities and differences among cases. Additionally, the perspective of military sociology offers insights into the internal dynamics of military power, providing crucial elements for understanding its inner workings.

By adopting this multidisciplinary approach, I aim not only to understand militarism comprehensively but also to capture the complexities inherent in this phenomenon, complexities that can be challenging to grasp from a single disciplinary standpoint. This combined approach allows for a nuanced understanding not only of the phenomenon itself but also of the characteristics defining the contemporary world. In Mann's words, "the most important characteristics of our world today can be appreciated more clearly by historical comparison. It is not that history repeats itself. Precisely the opposite: World history develops. Through historical comparison, we can see that the most significant problems of our own time are novel" (Mann, 1986, 32). This underscores the value of a multidisciplinary perspective in unraveling the intricacies of militarism and shedding light on the distinctive features of our present global landscape.

Throughout this dissertation, I will gradually show how historical sociology, comparative politics, and military sociology collectively contribute to analyzing both the broader picture

and the subtle details of civilian militarism in Colombia and Venezuela at the turn of the new millennium. The application of these perspectives will be multifaceted, with historical sociology employed to scrutinize the impact of gradual changes in economic power that played a role in fostering the emergence of civilian militarism. This phenomenon is distinct from the outcomes of interstate competition, as emphasized by the geopolitical school, including scholars like Mann and Tilly. Comparative politics will serve as a valuable tool in understanding how political power and institutional design, particularly under presidentialism, facilitated the consolidation of civilian militarism within the political strategies of leaders like Chavez and Uribe. Meanwhile, military sociology will contribute insights into how the military either embraced or resisted becoming part of political strategies, examining how they wielded power, whether in infrastructural or despotic forms, particularly in the concluding chapters.

The theoretical framework of this dissertation will heavily draw from Mann's approach, serving as a foundational basis for the analysis of civilian militarism in Colombia and Venezuela, as I discuss in the next section.

### **1.3. Mann's Sources of Power & Militarism**

Undoubtedly, one of Mann's most significant contributions to the social sciences is his IEMP model, which stands for Ideological, Economic, Military, and Political powers. Mann himself considers this model more as an analytical tool than a framework for reading society (Mann, 1993, 10). Several authors have recognized the impact of this academic contribution as a macro-level theory, the IEMP model aims to explain how power is distributed and maintained in society over time (Hall & Schroeder, 2006; Schroeder, 2016). Mann conducts a thorough historical sociology analysis, spanning from ancient times to the contemporary era. His monumental scholarship seeks to provide a comprehensive understanding of how different

sources of social power are combined during different historical stages, from periods dominated by military power to more complex civilizations that incorporate a mix of political, ideological, and economic powers in the modern era.

Mann's work represents a large-scale comparative analysis within the tradition of historical sociology, a tradition that has become less common in contemporary social sciences. In an era where military elements, especially concerning the survival of the state, play a crucial role, his approach offers insights into the emergence of militarism from geopolitical competition between states.

According to Randall Collins, Mann's approach aligns with geopolitical theory, emphasizing the importance of the military not only in external relations among states but also in internal structuring within a state's territory as it develops infrastructure to support its military forces (Collins, 22). This theoretical alignment makes Mann's approach particularly relevant to the main topic of this dissertation. However, it is acknowledged that some of the arguments within this framework may be subject to challenge in subsequent discussions here.

One foundational premise of Mann's academic enterprise is the concept that societies are organized as networks of power. This idea is crucial for this dissertation as Mann posits that a society, while constituting a unitary social system, is not a totality and is "constituted of multiple overlapping and intersecting sociospatial networks of power" (Mann, 1986). According to this perspective, these power networks interact with each other to assert dominance in the possession of power within a given society. Each source of social power, within Mann's model, possesses organizational means to achieve its objectives (Mann, 1986, 2). Consequently, organizations take the form of political parties, social movements, military groups, and religions, a dynamic that is explored throughout this dissertation. For example, the interactions between political parties during the consociational period in Colombia and

Venezuela, or the interplay between incumbents' political strategies and military power. In these power relations, motivations and actions play a fundamental role in decision-making at specific points in time (Kiser, 2006, 62).

A pivotal concept in Mann's approach is the understanding of power, a concept that shares similarities with the perspectives of Talcott Parsons and Anthony Giddens. In this context, power is comprehended as:

[...] the capacity to get others to do things that otherwise they would not do. In order to achieve our goals, whatever they are, we enter into power relations involving both cooperation and conflict with other people, and these relations generate societies. So power may be collective, embodying cooperation to achieve shared goals – power through others– and distributive, wielded by some over others (Mann, 2013, 1)

Among all the sources of social power in this dissertation, two are particularly critical: political and military powers. While these concepts are commonly addressed in the social sciences, Mann's presentation, especially regarding military power, distinguishes his social theory from perspectives of other social scientists such as Hegel and Weber (Poggi, 2006). In Mann's theory, military power is considered autonomous, challenging the classical perspective that suggests political power has control over military power, especially in terms of coercion. Mann, however, argues that military power is an autonomous source, seeking to fill a gap in social theory that has historically neglected this topic, though without exaggerating its role (Mann, 1986, 26). His analytical approach defends the autonomy of military power based on its *raison d'être*, which involves the preparation to use coercion and its unique internal dynamics. Nonetheless, these dynamics are constrained by competition with other sources of social power. The military lacks the tools or mechanisms to impact daily life or bureaucratic institutions independently, even under military authoritarianism. In

contrast, political power can influence daily life and institutions, due to its capacity to centralize power under the state control (Mann, 2013, 1; Lawson, 2006, 4).

Despite the central role that the military plays in Mann's theoretical perspective, he distinguishes it from militarist theories of the state proposed by figures like Weber or Hegel. Mann asserts that "the state's organization is not coterminous with the military organization" (Mann, 1984, 200). In essence, the logistics of coercion inherent in military power differ from the mechanisms employed by the state to centralize control over the territory. The state uses various mechanisms and actions, such as bureaucracy and institutions, to consolidate its power beyond coercion, a concept known as infrastructural power, which will be discussed later. Therefore, in society, political power and military power manifest in different forms, although they can be closely intertwined at certain stages of social development.

*Political power*, within Mann's framework, is conceived as a system of functions and regulations that are centralized and overseen by the state within each territory. This form of power is almost impossible to renounce, necessitating obedience from subjects or citizens who must adhere to the established rules or face punishment. In this structure of power, the state and political elites play a substantial role in decision-making once they assume control of political power (Mann, 2013, 2). Mann emphasizes that political power is centralized at the core and radiates outward, inherently tied to specific territories, thereby distinguishing it from other sources of power (1986, 27). This distinction forms an essential and independent chapter within this dissertation, where the dynamics of political power and its interactions will be explored in depth.

*Military power*, in Mann's conceptualization, refers to the social organization that controls lethal violence and is capable of exerting extreme violence when necessary. It is primarily subservient to the state, and while there is an overlap with political power, militaries typically

maintain a separate organization, functioning “often as a distinct caste in society” (Mann, 2013, 2). Although military power is highly valued by various groups in society for its capacity to influence competitive scenarios, it has limitations, especially in contemporary settings, such as its inability to mobilize public opinion effectively (Lawson, 2006, 4).

It is crucial to recognize that, according to Mann, all sources of power are "promiscuous," meaning that each source of power relies on factors from other sources to achieve its goals. These sources of power are not monolithic, and human agency is deemed essential for mobilizing them. Humans are viewed as the original source of power, a concept critical for understanding later discussions on popular support and the role of incumbents in the emergence of civilian militarism. Micro-level dynamics, therefore, play a pivotal role in decision-making processes.

In Mann's theoretical framework, the state holds a central position, conceptualized as a "territorially centralized and territorially-bounded" unit (Mann, 1986, 27). The state, according to Mann, is essentially an arena, a place, and yet, this spatial dimension is the “very source of its autonomy” (Mann, 1984, 187). The state engages in fundamental activities, including the maintenance of internal order, military defense against external aggression, the upkeep of communication infrastructures, and economic redistribution. The state dispenses both despotic and infrastructural power, present in varying proportions. This constitutes the fundamental essence of political power, utilizing the state apparatus to achieve centralization and territoriality, a process that can be realized through militarism or the deployment of despotic and infrastructural powers, as will be further discussed.

In Mann's approach, militarism plays a crucial role as a significant component, acting as an instrument to enhance the power of political elites over civil society. He emphasizes in his work that militarism serves as a means to articulate both political and military powers (Mann,

1984, 204; 1987; 1988). According to him, militarism is defined as "a set of attitudes and social practices which regards war and the preparation for war as a normal and desirable social activity." It is closely intertwined with political power, where the utilization of military organization to mobilize violence becomes a critical "instrument of human power" with the primary purpose of competing with other states (Mann, 1986, 26). Thus, "militaristic forms of social control attempted in peacetime are also highly concentrated" (Mann, 1986, 26). "Militarism has thus proved useful where concentrated, intensive, authoritative power has yielded disproportionate results" (Mann, 1986, 26). In other words, militarism is useful for cohesion but also achieves different goals for those who can control it within a given society.

Alongside militarism, two other critical concepts for this dissertation are *despotic* and *infrastructural* powers, which collectively play an essential role in consolidating state autonomy in relation to civil society and even increasing its power, according to Mann. Once in control of the state, political elites can deploy despotic and infrastructural powers to control civil society. However, in the process of interaction between these powers and civil society, certain procedures become institutionalized and routinized. This institutionalization ultimately limits the political power of the state and political elites in the long term.

*Despotic power*, as per Mann's framework, refers to "a range of actions which the elite is empowered to undertake without routine, institutionalized negotiation with civil society groups" (Mann, 1984,188). This may include the use of the military in unconventional missions beyond traditional roles like preparedness for war. On the other hand, *infrastructural power* is defined as "the capacity of the state to penetrate civil society and to implement logistically political decisions throughout the realm" (Mann, 1984, 189). This involves the state's penetration into everyday life through mechanisms such as "regular

taxation, a monopoly over military mobilization, permanent bureaucratic administration, and control over law-making and enforcement” (Mann, 1984, 209).

This kind of power allows, according to Mann, the state to become "a mere instrument of forces within civil society" (1984, 189-190). For that reason, there is a competence to take control of the state, which, however, has autonomy by itself.

Mann suggests that both despotic and infrastructural powers can be employed by authoritarian regimes to control civil society, a practice not significantly different from certain methods used by democratic regimes. However, the distinction lies in the rules and regulations, with democratic regimes relying on institutionalization and formal processes as infrastructural power rather than relying on pure repression (Fortin-Rittberger, 2014). The institutionalization of the military as a coercive force is common in both authoritarian and democratic regimes. Yet, the recurrent use of military power through coercion by state elites is unsustainable in any regime. Instead, militarism becomes a tool to subordinate and neutralize civil society when it challenges political power, requiring the application of despotic and infrastructural powers during this interaction (Mann, 1984, 204). This author notes that "infrastructural power is the essence of the routinized powers of states, while the exercise of despotic power is a sign of a weaker state" (Mann, 2016, 353).

Infrastructural power, manifested through state capacity and penetration into society, involves activities that a state undertakes throughout its territory to achieve social peace and political organization. These activities include providing domestic and international security through coercion, offering public services like education and healthcare, building infrastructure to connect different regions, and establishing a bureaucracy that solidifies state presence, primarily through infrastructural means and less through despotic power. Key attributes of state capacity include coercion, taxation, and bureaucracy (Hanson & Sigman,

2021). If these attributes are not effectively performed, militarism and military power can be used together by political power to enhance their power, with the military serving as a source of both despotic and infrastructural powers, an idea that I will explore in detail later.

Mann's analysis, rooted in a long-term historical sociological perspective, posits that economic and military powers are the most critical sources of change in society, serving as key determinants of social change (Mann, 1993, 251). In this respect, this perspective is useful to challenge Mann's own explanation about the emergence of militarism. Mann asserts that militarism arises primarily due to geopolitical competition, especially in the European context. However, in the case of Latin America, considering Colombia and Venezuela, militarism emerged due to economic factors oriented toward the domestic realm. Although the international geopolitical component was present, it is considered secondary and even marginal in driving the emergence and consolidation of civilian militarism.

Another crucial element in Mann's approach, vital for this dissertation, is the concept of the autonomous power of the state (Mann, 1984). This concept is closely intertwined with political power, as many political actors aspire to control the state. According to Mann, a state is considered autonomous when it has achieved its maximum development through the "usefulness of centralized, institutionalized, territorialized regulation of many aspects of social relations" (Mann, 1986, 26). Modern autonomous states operate with bureaucracies attached to contemporary ideologies, including the rule of law, fairness, justice, and impartiality, in this relation considering nepotism and corruption as something deplorable (Collins, 2006, 28). Thus, an autonomous state becomes less susceptible to manipulation by political actors once it has attained autonomy.

In conjunction with Mann's theoretical framework, this dissertation incorporates various concepts, among which the central one is "civilian militarism" (Rodriguez, 2018). Refining

this concept, which I proposed many years ago, and using Mann's contributions, civilian militarism is defined as the promotion of militaristic values related to war and preparedness for war by civilian elected authorities controlling political power. Elected officials employ military power alongside various militarist actions, attitudes, and societal norms to achieve their political objectives. This concept serves as a crucial analytical tool for understanding how civilians orchestrate a militaristic process that goes beyond the traditional roles and duties of the military, transgressing democratic norms and amplifying the role of military power in domestic affairs. Civilian militarism is designed to be a conceptual and analytical bridge connecting political and military powers in the contexts of Colombia and Venezuela, although it is useful for analyzing other countries and regions.

To operationalize the concept of civilian militarism, the dissertation utilizes the perspective of *militarization* proposed by Cynthia Enloe. Militarization is considered a "step-by-step social, political, and psychological process by which any person, any group, or any society absorbs ideas and resultant practices of militarism." This encompasses various scenarios, ranging from the militarization of society to the glorification of military activities in daily life (Enloe, 2016, 11-12). Enloe's perspective aligns well with Mann's theoretical framework, providing a nuanced understanding of how militaristic ideas permeate different aspects of society and contribute to the emergence and consolidation of civilian militarism.

In Mann's framework, *political elites* and *civil society* are essential concepts. According to this author, the state is considered autonomous, albeit under the control of political elites who enact a range of actions in the social realm through despotic and infrastructural powers (Mann, 1984, 190; 2010). In this dynamic, civil society emerges as the citizens separated from the elites but dependent on the state for coordination of activities. Over time, Mann suggests that the state transforms into a "mere instrument of forces within civil society,"

including economic and organized groups (Mann, 1984, 190 & 201-202). These concepts are vital for this dissertation, particularly in understanding how elected leaders in Colombia and Venezuela maintained a degree of autonomy concerning civil society.

Focusing on the Latin American context, Colombia and Venezuela are considered initially as democratic regimes during this period, something important to articulate with Mann's approach. In this respect, Guillermo O'Donnell provides valuable insight, considering that despite procedural deficiencies, certain countries can be categorized as "democratic". In a democratic regime, there is a state that territorially binds political citizens, ensuring basic political rights and obligations, with the state guaranteeing positive rights such as voting and the right to be elected. However, O'Donnell acknowledges that limitations against the opposition may arise at the level of government, leading to disputes between government and the opposition (O'Donnell, 2002, 29). Thus, considering these ideas, the term "fragile democracies" will be used in this context to describe Colombia and Venezuela during this specified period. To define authoritarian regimes and the traits of transition to authoritarianism, I will consider some ideas from Mann's scholarship. According to his ideas, authoritarian regimes can exhibit at least three characteristics. Firstly, they strive to retain political power for as long as possible by employing any means necessary to preserve their rule and focusing intensively on ways of achieving this goal. Secondly, these regimes suppress claims to civil and political citizen rights, sometimes resorting to indiscriminate repression. And thirdly, they typically have a dominant party that controls enormous infrastructural power, enabling them to endure in the long term (Mann, 2014; 2019).

#### **1.4. Against the Theoretical Framework: Some Alternatives**

As previously mentioned, Mann's perspective stands out as one of the rare social theories that incorporates military power and militarism as central but not definitive components in his explanation of the sources of social power and how various organizations within a society strive to attain and maintain power to achieve their goals. This work has not escaped criticism, with some arguing that it is overly ambitious to consider military power, along with militarism, as an independent component for analyzing contemporary societies. In this section, I will explore at least three alternative academic perspectives to Mann's approach and examine some arguments that may challenge his theoretical standpoint regarding the topics explored in this dissertation.

The primary critique against Mann's perspective focuses directly on his incorporation of military power within his theoretical framework and the limitations of using militarism given the evolving realities of recent decades. Gianfranco Poggi (2006) strongly opposes Mann's separation of military power as an independent source of social power. According to Poggi, classical traditions, dating back to Greek political thinkers, have regarded the military as a constitutive part of political power because only the state can employ coercion within a political entity. In this regard, Mann deviates from the conventional trinity of political, economic, and ideological powers. Thus, Poggi argues that the separation of military power as an independent source of power is unnecessary and even presumptuous since the state exists only under the condition of the use of violence. Mann, in his view, overemphasizes the role of the military in applying coercion. Furthermore, in the domestic sphere, coercion is predominantly exerted by law enforcement corps rather than the military, rendering the separation unnecessary. However, Mann posits that the military can be utilized in the domestic realm, asserting that they wield sufficient influence to constitute an autonomous

source of power. Even in exceptional times, military leaders tend to assume control over law enforcement, as I intend to illustrate in this dissertation as one aspect of civilian militarism. This perspective is commonly cited as an explanation for militarism's detrimental impact on democratic regimes. Similarly, Laura Sabotin has demonstrated that military power, due to its prestige and autonomy, tends to exaggerate the threats facing a state and exerts significant influence over political authorities, potentially advocating for military ventures that politicians would not have pursued independently (2022). Indeed, under volatile political scenarios and a perceived threat to their status or beliefs, military power can be leveraged to influence political power. Poggi, however, underplays the relevance of military power and militarism in society, overlooking the historical presence of military power before the emergence of the modern state, as Mann highlights in his scholarship (2006, 353). Perhaps, these critiques are rooted in a lack of historical perspective.

Siniša Malešević is another scholar who has criticized Mann's integration of military power into his analytical model, particularly concerning his explanations of recent centuries. Despite acknowledging the critical role that Mann attributes to the military among contemporary social theorists, Malešević takes issue with Mann's assertion that military power has declined in the global North, losing relevance as a source of social power. Malešević contends that military power remains crucial in other parts of the world, a perspective also acknowledged by Mann in other works when he stated, "Militarism is far from over in the South, but it is assisted by the North" (Mann, 2018, 53).

Another criticism leveled against Mann's work is related to the perception that he only recognizes coercion exerted by military power. Malešević argues, "As the cumulative bureaucratization of coercion expands, states and other social organizations tend to acquire even greater capacity for coercive action" (2016, 122). However, Malešević emphasizes that

this coercion is often non-lethal, involving tactics such as blackmail, public shame, self-censorship, and disciplinary actions. While these forms of social pressure are valid, they do not equate to the coercion exerted by military power, which entails the threat of harm or death. Military coercion is the ultimate form of coercion because it is organized and lethal. Malešević opposes Mann's autonomous role of military power, asserting that "by splitting military from political power, one cannot properly account for the rise of coercive organizational power over the past three hundred years," indicating that state coercion is not synonymous with military power coercion (Malešević, 2016, 125).

Malešević's ideas are partially true, a combination of military power aims and military power capabilities, which I will term as civilian militarism following Mann, enables the control of subjects in a combined form using the legitimate authority of the state and the presence of military power, both of which have a significant impact. This characteristic has been explored in military sociology, examining how the construction of unity among the military fosters a strong bond among their members and cultivates a powerful demeanor, amplified by weapons and military gear (Moskos, 1969). Scholars conducting fieldwork in conflict zones or hot spots are familiar with the aura transmitted by the military—authority combined with respect and, at times, fear or even terror. Consequently, when authorities face unexpected domestic security challenges, they often turn to the military for support law enforcement, introducing the inherent risks associated with the military's training to act collectively, including the use of lethal force against ordinary citizens. Interestingly, Malešević, while criticizing Mann, later acknowledges that micro-level analysis focusing on war and armed situations, proves these have a powerful impact on shaping military power (2016, 135-137).

The second group of scholars, while not explicitly addressing Mann's work, critiques some of the fundamental tenets of his theoretical approach, particularly elements related to

militarism, war, and militarization, or alternatively, suggests a reformulation of their scope (Leander, 2022). These scholars associated with critical security studies, advocate shifting focus to securitization, policy, and law enforcement analysis. One prominent critic of militarism and militarization is Alison Howell, who, in a thought-provoking article, argues that these concepts are outdated and inadequate for understanding contemporary realities concerning the use of coercion beyond a militaristic lens. She underscores that "current events consistently point to some new domain of civilian life being overtaken by military values, technologies, or aesthetics," which she labels as militarization" (2018, 117). With obscure and sometimes complex arguments, this author suggests that militarization is insufficient for comprehending warlike relations in various societies with disadvantaged minorities and underprivileged people. Instead, she puts forward the concept of "martial politics." This idea aims to challenge the notion that there was a pre-militarist stage before militarization. According to the author, such a stage does not truly exist, as there has always been a militaristic atmosphere, and almost everything is a by-product of militarization. Thus, she asserts, "martial politics is the liberal norm, not the exception" (Howell, 2018, 121). However, despite Howell's intriguing analysis, few scholars in the field of war or security studies deny that liberalism contains a militarist component. Implicit references to militarization through militarism can be found in Mann's work, where he suggests that under capitalism, states neglecting militarism tend to disappear due to geopolitical competition (Mann, 1984). Tarak Barkawi has also mentioned that militarism is inherent in liberalism's pursuit of its goals (2005). While these perspectives are more related to the international scenario, this dissertation aims to demonstrate that despite the liberal project's emphasis on denouncing the perils of militarism for democracy, militarism itself has emerged within the context of democracies under neoliberal economies. Therefore, it may not require a

significant academic effort to reconceptualize a term that even has a political component useful for critiquing abuses of state or autocrats against their populations. Almost any country considered a democracy is reluctant to be labeled as "militarist" because this undermines its domestic and international legitimacy. Howell falls short in exploring the extensive scholarship on militarism and broader approaches, asserting that for the current scholarship "[militarism] relies on a false distinction between what kinds of politics happen at 'home' versus in 'war'" (2018, 125). Despite claiming that the new concept can be used to "excavate the violence of the liberal order," existing concepts of militarism and even militarization have already discussed the entrenched relationship between militarism and liberalism for decades. The new concept, though novel and interesting, overlooks the consideration of the already-existing scholarship, highlighting the drawback of narrow social science approaches or beliefs that precede comprehensive understanding.

In a similar but more balanced perspective, Frowd and Sandor suggest that concepts of militarism and militarization are appropriate for use when analyzing "state's organized coercive capacities, and 'militarization' as a way of grasping intervention practices' shift towards martial violence." However, they acknowledge that these concepts may not be entirely efficient in analyzing "forms of symbolic violence that fall under the more elastic concept of security" (2018, 71).

Finally, another perspective that explores the relationship between political power and military power, and aligns with certain aspects of Mann's analysis, particularly those discussed in this dissertation, is the concept of "bonapartism." Originally attributed to Marx in his work "The Eighteenth Brumaire of Louis Bonaparte," this concept elucidates the concentration of power by presidents who utilize military force to counter political challenges, often in the face of social upheavals. The term has experienced a resurgence in

application, especially in countries with a presidential system, with notable examples being France, where it has been associated with leaders like Charles de Gaulle, Nicolas Sarkozy, and Emmanuel Macron. According to Nere Basabe, bonapartism can be characterized by features such as “the preeminence of military power and glory, the personalized cult of authority, bureaucracy, anti-parliamentarism, public order, national unity, and centralization in a strong state, but also, civil equality, universal male suffrage, popular mobilization, modernization, and social concerns are also highlighted” (Basabe, 2021, 836).

Despite the contestation of Mann's theoretical approach present in these three critiques, this continues to provide a broad framework for analyzing the complexities of militarism and its relations with political and military power. While this theoretical approach is ingrained in a way that can be useful as a model, it does not dictate the results in advance. On the contrary, due to its flexibility, it provides the tools—the different sources of social power—that, according to the interaction of networks of power and circumstances in each country studied, can be useful to track different experiences that can produce similar or different outcomes. Similarly, militarism is articulated not only as a set of ideas to identify the phenomenon, but also as the potential to be considered in terms of practices and actions in the social realm.

## **1.5 Contributions**

### **1.5.1 Civilian Militarism**

Civilian militarism is a concept crafted to encompass the interplay between political and military power in the pursuit of the political goals of incumbents within democratic regimes. Its focus is typically on enhancing deteriorated state capacity and, foremost, securing and maintaining political power over the long term. This concept is rooted in Mann's theoretical framework on the sources of social power, particularly political and military power. This concept has been specifically tailored to the context of democratic regimes operating within

the domestic sphere. Civilian militarism expands on Mann's definitions (1988, 2018) and is adapted to the dynamics of elected civilian authorities who endorse militaristic values associated with war and its preparedness (Rodriguez, 2018). These authorities employ military power alongside various militarist strategies, attitudes, and societal norms to further their political objectives. This concept provides a nuanced understanding of how civilians orchestrate a process of militarization that goes beyond the conventional roles of the military and standard democratic procedures. In this process, they might compromise democratic norms and bolster the influence of military power in the domestic sphere, led by incumbents who employ coercion as a foundational state capacity to ensure sovereignty and domestic security. However, this can escalate into abusive practices in certain instances within this militaristic atmosphere. This abuse may manifest in the form of infrastructural or despotic power, employing legal or illegal forces. This issue will be discussed in the sixth chapter, which explores the compromising of freedom, civilian rights, and political liberties—essentially, the impact on democracy.

The use of the term "civilian" recognizes the democratic setting, highlighting that despite the institutional framework of democracy, incumbents leverage militarism to remilitarize the state while pursuing their political objectives. What may initially begin as subtle militaristic elements can evolve into explicit and potentially perilous actions for both political regimes and societies at large.

Led by civilian authorities, civilian militarism has the potential to blur the distinction between political and military power, posing a significant threat to democratic regimes. If left unchecked, this phenomenon may even lead to a transition toward authoritarianism. The concept of civilian militarism offers an alternative to existing terminologies, emphasizing the civilian character championed by incumbents as they unfold a militaristic discourse,

practices, and actions. While contesting the idea of geopolitical militarism proposed by Mann (1984b; 2012), civilian militarism places greater emphasis on its domestic character, highlighting its emergence within democratic regimes rather than as a consequence of interstate rivalry, as I will show and explain later.

### **1.5.2. Military Power as a Source of Infrastructural and Despotic Power**

Monica Prasad (2016) emphasizes that one of Mann's most significant contributions to social science analysis has been the idea of despotic and infrastructural power in relation to political power. Building on this idea, this dissertation contributes by arguing that under civilian militarism, integrated into the political strategies of incumbents, military power functions as a dual source of despotic and infrastructural power. This dual role is necessitated by the deterioration of state capacity. The military becomes an instrument to enhance the state's capabilities while, at the same time, inhibiting the consolidation of a civilian bureaucracy, either through negligence or deliberate action.

For Mann, despite some states being more violent than others and attempting to wield despotic power, in the long term, they need to institutionalize and transition from despotic power to infrastructural power, not only for their own survival but primarily for legitimacy and international credibility (Mann, 2016, 353). However, the prevailing circumstances in Colombia and Venezuela at the turn of the new millennium saw military power becoming a pillar and a manifestation of civilian militarism deeply entrenched in political strategies.

The articulation between civilian militarism and the use of military power as a source of despotic and infrastructural power became evident in both cases. However, as I will analyze later, Venezuela became an extreme example. Military power became omnipresent, initially legitimized by laws but transitioning into support for the Bolivarian political strategy that enabled the retention of power, first under Chavez and later under Maduro.

Thus, commencing with an in-depth analysis of networks of power between political and military entities, I will contribute to the examination of militarism, viewing military power as a source of despotic and infrastructural power that fluctuates according to circumstances. The aim was to remilitarize the state apparatus, sometimes in response to existential threats, but in other instances, to fortify political regimes. Drawing from Joana and Mérand's work, it can be asserted that the decline in state capacity triggers a remilitarization of the state, utilizing both civilian militarism and military power as complementary tools. According to these authors, the militarization of the state occurs when it lacks sufficient power. However, once this transpires, there is a gradual process of demilitarization within the state, involving the reinstatement of civil bureaucracy and a shift towards privatization (2014).

Military power serves as a source of social transformation. In Venezuela, the military played a pivotal role as an infrastructural power, undertaking diverse responsibilities such as managing state enterprises, overseeing supermarkets, providing advice on domestic security issues, and serving as the backbone of the Bolivarian political strategy that radically transformed Venezuela. In Colombia, despite the military's role as a legitimate source of infrastructural power, primarily as legitimate coercion, it tended to become despotic due to political pressure and its own shortcomings. This involvement sparked a debate between the politicization or professionalization of the military, carrying various implications for state and democratic consolidation in Venezuela and Colombia.

### **1.5.3. Contradictions of Neoliberal Discourse and its Consequences**

During the 1980s and 1990s, Latin America underwent the implementation of neoliberal policies driven by the belief that these measures would address economic problems stemming from excessive state intervention in the domestic economy. Thus, two contradictions emerged. On one hand, the neoliberal agenda involved reductions in social spending,

particularly in education and health, economic deregulation, trade liberalization, downsizing of state bureaucracy, and restrictions on state-led infrastructure development, thereby weakening state capacity.

On the other hand, a contradiction within the neoliberal discourse surfaced during this period, leading to specific consequences for the region, notably in Colombia. While neoliberal advocates promoted the trade liberalization of all goods and manufactures under the Washington Consensus as the ultimate solution for underdevelopment in Latin America, substances such as heroin, cocaine, and marijuana were simultaneously persecuted and illegalized in the global North due to moral and political considerations. (Levine, 2003). This contradiction prompted the rise of illegal trade to meet the demand for these prohibited items in the global North, taking advantage of open borders and free trade to export these illegal items (Saenz, 2011, 2021). Both circumstances collectively contributed to the deterioration of state capacity, impacting the government's ability to fulfill its basic functions of providing public goods or legitimate coercion. This deterioration was exacerbated by the strengthening of defiant armed groups fueled by drug trafficking money, which enabled them to challenge the state apparatus and even its existence, particularly in Colombia.

Authors from different academic perspectives, from Michael Mann to Francis Fukuyama, concur that neoliberalism had a profound impact on state capacity deterioration. Mann argues that under neoliberalism, infrastructural and despotic power were limited or eroded due to the belief in the power of self-regulation for services usually provided by the state (Mann, 2012, 322-360). Fukuyama suggests that the state apparatus was reduced because it was viewed as an obstacle to freedom, particularly economic freedom (Fukuyama, 2022, 28).

Consequently, alternative radical projects emerged in Colombia and Venezuela as responses to the challenging circumstances. Figures like Hugo Chávez and Álvaro Uribe presented

political projects that included militarism as a core component to address domestic issues. This challenges Mann's assumption that militarism primarily emerges from geopolitical competition between states. According to Mann, "by far the greatest contributor to militarism is the multi-state system in which warfare has been a normal, and often rational, element throughout recorded history" (Mann, 1984b, 144). In the context of Colombia and Venezuela, militarism emerged as a response to the adjustments of liberalism, specifically neoliberalism, intending to address deteriorated state capacity through militarism led by civilian elected authorities and military power as a tool.

This argument will be reinforced in the analysis presented in Chapter Five, demonstrating that despite the differences between Colombia and Venezuela—exacerbated by factors such as distinct political orientations (right-wing in Uribe's government and left-wing in Chávez's government) and influences of extra-regional geopolitical disputes between the United States and Russia—the emergence of civilian militarism in both countries was primarily driven by domestic circumstances rather than an interstate dispute.

## **1.6 Methodology**

This dissertation employs the comparative method as its foundational framework, adopting a multidisciplinary perspective from comparative politics, historical sociology, and military sociology to comprehensively investigate the causes of civilian militarism's emergence and consolidation, as well as the variations in outcomes between Colombian and Venezuelan cases. In this endeavor, Mann's sources of social power (mainly political and military) serve as a theoretical reference, guiding an exploration of how interactions contribute to the manifestation of civilian militarism in these countries. This exploration aims to identify the unique characteristics of civilian militarism, allowing for a critical examination and challenge of some of Mann's arguments.

According to Hans Keman, the purpose of comparative analysis is to explain 'puzzles' or contrast hypotheses about a phenomenon that cannot be adequately studied without comparison, requiring logical reasoning for potential answers (2006, 8). The comparative perspective proves invaluable not only for unraveling the intricacies of the interaction between political and military power but also for gaining a holistic understanding of militarism in Colombia and Venezuela. This involves a pure comparison, simultaneously contrasting both cases throughout all chapters, a departure from the more common practice in scholarship, which generally involves general comparisons followed by individual within-case studies (e.g., Gamboa, 2022).

This method allows for the examination of complex relations between key actors in this relationship over time and the resulting outcomes of these interactions. It seeks to identify causality and understand why outcomes varied between the selected cases, despite initial similarities. Mann's approach, considering that “societies are constituted of multiple overlapping and intersecting sociospatial networks of power” (Mann 1986: 1), provides valuable insights for analyzing and interpreting these interactions among different sources of social power and actors.

While there is no standardized perspective on conducting a comparison, key authors in this field, such as Skocpol (1979), Tilly (1990), and Mann (2013), share certain characteristics in their comparative research. They trace changes over time by studying trajectories, compare and contrast multiple cases to move beyond simple explanations, apply theoretical prepositions to guide their analysis, and present results as narrative comparisons, highlighting relationships between different issues, similarities, and differences. This methodological approach facilitates a detailed study of the topic through a historical analysis approach while

providing the flexibility to build explanations that consider the theoretical perspective for refinement.

Given that historical sociology enables the observation of social change and variations over time; comparative political analysis is valuable for identifying causality; and military sociology provides insights into micro-level manifestations of phenomena, this dissertation employs a balanced approach between them. Drawing from Mann's hypotheses, the study tests his ideas with empirical cases, engaging in a dialogue with the theoretical framework to generate new hypotheses, arguments, and concepts for more refined explanations.

Maintaining this balance involves structuring the dissertation to explore changes in economic power that result from shifts in the economic model. Contingency is addressed by examining the myriad problems that arise in economic, political, and social realms, while agency, particularly the role of incumbents and other organized actors, is emphasized. This organizational aspect will be detailed further in the subsequent chapters.

Mahoney's perspective points out the affinity between qualitative research and conceptual development is integral to this approach. Qualitative researchers hone concepts with fine-grained evidence from cases (Mahoney, 2007, 127). Consequently, a meticulous qualitative examination of historical sources contributes to robust explanations. This is achieved through the study of small-n cases from a qualitative perspective, allowing for the testing of causality between the cases of Colombia and Venezuela and extracting nuanced details that contribute to the formulation of hypotheses and the coining of concepts to describe the phenomenon.

Moreover, qualitative research from a historical perspective is considered less likely to exclude important elements critical for understanding causality in the emergence and consolidation of civilian militarism (Mahoney, 2007, 130). The chosen methodology provides a rich exploration of historical events and sources, enabling a comprehensive

understanding of the temporal processes inherent in the phenomenon under investigation. This approach is deemed ideal for hypothesis creation, allowing for the formulation of elaborated research questions, and facilitating the study of outcomes over time (Mahoney, 2007, 126).

The presentation of results will highlight specific patterns common to both types of civilian militarism while underscoring their divergences in terms of interactions within each case.

In summary, the dissertation's methodological approach integrates historical sociology, comparative political analysis, and military sociology to explore the emergence and consolidation of civilian militarism in Colombia and Venezuela. The study aims to strike a balance between structural analysis, contingency considerations, and actors' agency, employing qualitative research to develop strong explanations and new concepts, particularly through the study of small-n cases from a historical perspective.

### **1.6.1. Cases**

One of the most basic but also difficult steps in comparative research is the selection of cases. There are several perspectives, but one of the most accepted is that cases need to have something in common to be compared academically. In other words, the comparability of the cases should be pertinent, even if the outcomes differ over time. In this kind of design, small-n cases are the most appropriate for unraveling critical elements of the phenomenon, particularly causal inference (Berg-Schlosser and De Meur, 2009).

For this research, I have chosen two cases: Colombia and Venezuela. This selection is based on a more flexible perspective and aligns with some of the points outlined by Ragin's Qualitative Comparative Analysis (QCA) perspective. Ragin suggests that the selection of cases should be based on the outcomes of cases with similar characteristics. Accordingly, the cases are chosen considering variation in the outcome. For instance, while militarism in

Venezuela led to authoritarian consolidation, in Colombia, it resulted in a deepening of democracy. Following this methodology, I identify in this dissertation the factors that contribute to the variation in outcomes (Ragin, 1984, 2014). Likewise, it is possible to consider the so-called “most-similar cases with different outcomes” approach, as proposed by Berg-Schlosser and De Meur, for the selection of cases in this research. They consider that “paired comparisons [...] may lead to a narrowing down of the ‘conditions of occurrence’ for explanatory purposes, in order to identify some factors that may possibly be responsible for the respective outcome” (2009). In this instance, both countries were democracies with some presence of militarism, yet the outcomes were different. Therefore, comparing Venezuela and Colombia allows us to extract the similarities and differences in explanatory factors to find causal relations and understand the variation in outcomes. As suggested by Desrosiers and Vucetic (2018), comparing these similarities and differences between Colombia and Venezuela enables us to derive causal understandings of militarism.

In this respect, the selection of Colombia and Venezuela started by considering some apparent similarities between both cases that, however, reveal important differences upon detailed examination, particularly concerning political power, military power, and militarism. At first glance, both countries exhibit stable democratic regimes, economic stability, and a similar cultural/historical background. However, a closer look over the period between 1998 and 2016 reveals substantial differences, making them ideal for testing the theoretical framework, causal arguments about the emergence of civilian militarism, and understanding levels of confrontation stemming from historical rivalry.

During the early 21st century, Colombia had right-wing governments, whereas Venezuela experienced prominence of left-wing governments, each presenting distinct models of government and political goals. This aspect aligns with a comparative historical sociology

approach, allowing for a certain degree of difference between cases to analyze the topic. The potential findings from the research between both cases could provide insights into complex contemporary issues related to political and military powers, democracy, and state consolidation. It aims to uncover causality, exploring why civilian militarism embedded into political strategies led to authoritarianism in one case and facilitated the enhancement of the democratic game in the other.

Indeed, Colombia and Venezuela present ideal circumstances for comparison, chosen for several compelling reasons. Firstly, both countries have undergone a process of militarization in recent years, drawing attention from scholars and policymakers due to profound consequences for their societies and political regimes. Colombia grapples with a longstanding internal armed conflict, while Venezuela faces a significant humanitarian and economic crisis. Secondly, these nations share an unconventional tradition of stable democratic regimes in Latin America, particularly disrupted recently in the case of Venezuela.

Thirdly, sharing a common border and some cultural traits, despite differences in political institutions and traditions, adds to their most similar status. Colombia operates as a unitary state, while Venezuela has a federal system of government. Although their party system structures were similar for many years, both being catalogued as "consociationalist systems," analyzing variations in civilian militarism by observing differences in political systems is an excellent exercise. Fourthly, despite the attractiveness of these cases for comparison, there has been limited academic interest according to the literature review. Geographical and historical proximity, particularly concerning military issues, further underscores the significance of studying these countries.

This academic work will focus on the period from 1998 to 2016. This timeframe allows for an analysis of changes and continuities within these countries, facilitating a comparative study of the phenomenon. The year 1998 is critical for both Venezuela and Colombia. In Venezuela, Hugo Chavez's election marked the beginning of significant societal changes, while in Colombia, it signaled an escalation of violence associated with the internal armed conflict. The endpoint in 2016 is equally crucial, encompassing the signing of the Peace Agreement between the Juan Manuel Santos' government and the left-wing guerilla FARC. For Venezuela, this year is pivotal for Nicolas Maduro's presidency, marked by efforts to retain political power despite several internal challenges.

### **1.5.1. Data Collection**

The primary data for this dissertation is derived from documentary sources, with a particular emphasis on primary sources concentrated on the period from 2002 to 2010, encompassing the terms of Chavez and Uribe. These primary sources include articles from newspapers and political magazines, sourced from publications such as Magazine *Quinto Dia* and *Zeta* in Venezuela, and Magazine *Cambio (16)* and *Semana* in Colombia. These magazines were consulted and scanned at the National Library of Colombia and the National Library of Venezuela. Additionally, the data incorporate laws, ministerial and governmental reports, military manuals, and publications, as well as presidential discourses, all of which were gathered during various trips to Colombia and Venezuela in military and civilian libraries before the pandemic and systematically analyzed later.

For the periods of 1998-2002 and 2010-2016, I gathered information from electronic newspapers and magazines, relying more on secondary sources. Throughout the entire data collection process, information from primary sources has been cross-referenced with secondary sources. This approach serves a dual purpose: validating the information and

critically assessing the sources to refine the data obtained. Secondary sources, in this context, refer to contextual information found in books and peer-reviewed articles about both cases, produced by scholars and available in local libraries in my area of residence.

### **1.6.3 Data Analysis**

To analyze the data, a historical analysis perspective has been adopted. This approach necessitates a systematic and logical examination and presentation of information, aiming to establish connections among events in a coherent manner, thereby allowing the sources to speak for themselves. Thus, the emphasis will be on examining the process in detail, a distinctive feature of the chosen historical perspective. As mentioned earlier, the comparative arguments will be constructed by contrasting likely theoretical perspectives with the data, with the aim of maintaining coherence and logical consistency.

Comparative historical sociology provides flexibility in organizing the research and presenting results in accordance with the historical order and coherence found in the data. This flexibility allows the researcher to navigate through the complexity of historical narratives and develop refined comparative arguments that align with the intricacies of the cases under examination.

## **CHAPTER 2**

### **STABILITY, ECONOMIC CRISIS, AND NEOLIBERALISM**

#### **2.1. Introduction**

Democracy has often been regarded as a means to foster peace both domestically and internationally (Farnham, 2003; Femke, 2020). However, Tarak Barakawi contrasts this notion by highlighting that while liberals have frequently emphasized the potential of free trade and capitalism to promote harmony, military force has been widely employed to achieve these ends (Barkawi, 2006, 3-4).

Latin America serves as a perfect scenario to analyze and illustrate some of the contradictions of liberalism, particularly concerning the emergence of civilian militarism in the early 21<sup>st</sup> century. Liberalism has deep historical roots in the region, and despite often being overlooked in international literature, Latin America was an early proponent of the international liberal order, advocating for the recognition of the nation-state as the primary political entity, democracy as the preferred political regime, and capitalism as the economic model since the early 19<sup>th</sup> (Long, 2018; Rodriguez & Thornton, 2022). Political elites and societies in the region have embraced liberalism in various forms over two centuries (Rodriguez, 2021; Kurtz & Brooks, 2008).

Scholarly perspectives diverge regarding the impact of liberalism on the emergence or exacerbation of militarism. Some authors argue that democracy and capitalism, as integral aspects of the liberal project, play a positive role in mitigating or eradicating militarism through economic and democratic development (Mulligan et al. 2004; Bouthoul, 1971, 23-26; Fukuyama, 2022, 5). Others suggest that liberalism and militarism are intertwined, serving certain objectives in a mutually interdependent manner (Mabee, 2016; Basham,

2018). Another group of scholars posits that liberalism, particularly capitalism, reinforces militarism to maintain political power (Rix, 1992; Man, Paik & Pappademos, 2019).

Regarding militarism, there is a consensus in the literature about its detrimental influence on democracy. This is especially evident in the military's involvement in domestic affairs, the militarization of law enforcement, and the propagation of militaristic behaviors and attitudes throughout society, which restrict political participation and civil liberties (Zafirovski, 2020; Stavrianakis & Stern, 2018; Howell, 2018; Leander, 2022).

In Latin America, despite the longstanding history of the liberal establishment, militarism has emerged in the contexts of internal conflicts and military dictatorships, rather than emerging from competition between countries. Militarism has functioned as an instrument of control and coercion (Centeno, 2002; Rouquie, 2011). However, while militarism is recognized as detrimental to democratic development, its manifestations, particularly coercion, have been considered beneficial for state survival and consolidation (See Weber, 1978, 54-55). Nevertheless, these benefits are more pronounced when directed against foreign rivals (Tilly, 1985, 180) and less impactful when responding to domestic threats (Thies, 2005). In this context, state consolidation seems to be a prerequisite for long-term democratic development, although contextual factors play a critical role (Wang & Xu, 2015).

Despite this, state consolidation has remained weak in Latin America. War has not been the primary driver of state formation, and the state has not extensively engaged in warfare across the region (Thies, 2005, 451). Centeno has noted that, contrary to common assumptions, the state in the region is far from being a repressive leviathan; its presence has been absent, except for certain brief episodes of brutality. State fragility in the region resulted from the absence of interstate rivalries that would have necessitated building state capacity for survival

and the availability of international loans that reduced the need for a local taxation apparatus (Centeno, 2002).

Building upon this premise, recent scholarship has concluded that state formation in Latin America was primarily driven by market forces rather than war-driven forces, resulting in insufficient state capacity and ultimately leading to weak states in the long term (Mazucca, 2021, 21). Similarly, the monopoly on state coercion has been weakened by private interests (Huber & Stephens, 2012, 39-41). In this regard, market forces can derivatively hinder state consolidation.

The processes of democratic and state consolidation have been intertwined in the region, following a tumultuous path over time. The absence of a robust and autonomous state has hindered democratic consolidation due to inadequate state capacities, leading to ongoing struggles to incorporate peripheral regions and broad segments of the population into the democratic game. Mazucca and Munck (2020) have proposed the existence of a trap in Latin America: democracy has not contributed to enhancing state capacity, and the state has not contributed to improving the quality of democracy.

Over the past fifty years, state and democratic consolidation have been undermined also by the impact of neoliberal policies. Firstly, policies advocating for the dismantling of the state apparatus had a detrimental effect (Fukuyama, 2022, 28). Secondly, a contradiction between discourse and practice became highly pernicious. The discourse of free trade was based on the law of supply and demand, while goods such as cocaine, heroin, and marijuana were banned under moral and political claims (Levine, 2003). Likewise, neoliberalism, mainly through open markets and free trade, facilitated the illegal trade of these items (Saenz, 2021). This contradicted the main values of liberalism, which neoliberalism reclaimed, as the idea that individuals under this system of beliefs develop the virtues for free choice (Galston,

1988). Both points triggered in different ways social, political, and economic unrest, which has been ambivalently addressed through civil militarism, as I aim to demonstrate in this dissertation.

Hence, despite suggestions from liberal literature that democracies tend to be less militaristic than authoritarian regimes (Zafiroski, 2019), the combination of various factors led to the rise of civilian militarism within democratic regimes, primarily due to the influence of neoliberalism and its unintended consequences in Colombia and Venezuela. In this chapter, I will study how these countries with fragile democracies during the Cold War never achieved the building of an autonomous state due to political clientelism. Once they confronted the contradictions of neoliberalism, it further weakened the state. This opened room for the emergence of political figures who offered radical solutions, such as Hugo Chavez and Alvaro Uribe. Thus, in this historical introductory chapter, I will analyze the main factors and causes that contributed to the emergence of these political figures with a militaristic component.

Firstly, I will examine the consolidation of modern democracy in Colombia and Venezuela through consociationalism, which provided stability through elections and clientelism, although it hindered the establishment of an autonomous state. Secondly, I will analyze the economies of both countries during the Cold War, examining their initial stability and subsequent crises. Thirdly, I will examine how the economic crisis and the adoption of neoliberalism affected state capacity through reforms and the contradiction regarding illegal drugs. This situation led to social disruptions that exacerbated a political crisis, ultimately opening the door for alternative political projects. Finally, I will provide a brief conclusion about the main findings.

## **2.2. An Era of Stability**

### **2.2.1 Democracy as Consociationalism**

During the Cold War, several countries in Latin America experienced authoritarian rule. Colombia and Venezuela were exceptions, maintaining democratic regimes, despite not reaching a high level of modernization or industrialization (Inglehart & Welzel, 2010), or having extensive social movements advocating for the establishment of democracy (Teorell, 2010). Although these countries were democratic in a minimalistic way, their stability over an extended period made them particular cases. While the quality of these democratic regimes is low compared to contemporary standards, their stability enables us to observe the causes that led to the emergence of civilian militarism under democratic rules.

Consociationalism played a critical role in these regimes' stability. Widely studied by scholars, it is understood as a type of democratic system that promotes the sharing of political power between major parties due to political, religious, or ethnic cleavages, with the aim of neutralizing violence and extreme political exclusion (Lijphart, 1969). This type of political system was critical in Venezuela and Colombia for preserving democracy and preventing the rise of military authoritarianism and populist leaders. However, this came at the cost of limiting democracy and maintaining privileges for the ruling groups.

Consociationalism emerged through agreements among elites to neutralize various political and social forces, including those associated with the former military governments of Marcos Pérez in Venezuela and Gustavo Rojas in Colombia. In Venezuela, the formation of this political systems took shape through a coalition between the political parties *Alianza Democrática* and *COPEI* (Comité de Organización Política Electoral Independiente). Termed the Punto Fijo pact, this agreement remained in effect from 1958 to 1989 (Hernández & Rondón, 2005). In Colombia, a coalition pact was signed between the Liberal and

Conservative parties, and this period became known as the Frente Nacional, lasting from 1958 to 1991 (Hartlyn, 1993). While both political systems aimed to distribute political power between dominant parties, the Venezuelan case was less restrictive than its Colombian counterpart. It permitted the involvement of third parties or newcomers in the political arena, including left-wing parties (Martz, 1992, 42).

Mann defines power as "the capacity to induce others to perform actions they would not otherwise undertake" (Mann, 2013, 1-2). In both countries, elites utilized shared political power to influence other political actors and ordinary citizens, aiming to achieve their objectives through the institutionalization of democratic practices. These practices included routine elections and non-formalized methods such as clientelism, playing a crucial role in sustaining these regimes.

For nearly half a century, the primary political actors and the general population recognized democracy under consociationalism as the only game in town. Even the most radical opponents acknowledged the need for broad participation within the existing political frameworks (Ayala, 1996, 263-274; Hidalgo, 2007, 17). Among the practices that contributed to consolidating these democracies were elections combined with political party membership. While elections in neighboring countries were frequently manipulated or nonexistent, in Colombia and Venezuela, although with limitations, they were regular, free, and characterized by a significant level of participation and uncertainty in the results, at least between the major parties. Elections deepened the interaction between political parties and the population, solidifying it as a well-entrenched democratic procedure (Levine, 1973; Leal, 1989). To a certain degree, in both instances, the electoral dimension played a crucial role in bolstering democracy and, to some extent, state capacity.

Moreover, in Colombia and Venezuela, people embraced democracy as an integral part of their domestic political traditions. Political affiliation with parties carried significant importance, as these parties were perceived as representatives and champions of the primary political interests within society. Some authors contend that a robust democracy hinges on the engagement of active political parties (Levitsky & Cameron, 2003).

However, in these countries, the clientelist component also played a critical role in political affiliation. The dominant political parties became sources of employment and political support for private initiatives and ordinary individuals alike. Winning an election for a party represented not only access to power but also access to state resources to share with its political clientele. I will further explore this aspect in detail, specifically in relation to state capacity.

From the beginning, these pacts were signed among political elites, excluding political minorities, and marginalized majorities. This exclusion was more pronounced in the case of Colombia than in Venezuela (Canache, 2004, 33-49; Dávila, 2002). Consociationalism proved effective in controlling political power and preserving the interests of political elites against those of the entire population. Ana Maria Bejarano points out that exclusion and political conservatism were the price to pay to maintain democratic stability (2011, 120-125). This democratic regime survived in Venezuela because it allowed the construction of reconciliation among political elites and different actors through a semi-corporate relationship to share both benefits and political power (Viciano & Martínez, 2000, 150). In Colombia, this coalition pact facilitated the enhancement of constitutional rule, resulting in a reduction of sectarian political violence that had been prevalent among the supporters of major political parties (Palacios, 2006, 170-178).

Colombia and Venezuela found these pacts useful in dealing with the emergence of populist leaders because the coalition agreements constrained individualistic adventures outside of the major political parties, which differed from other regional experiences (Torre, 2017). Likewise, presidential power was facilitated by coalitions formed around consociationalism (Mainwaring, 1990).

However, by the late eighties, these pacts lost credibility among the people. This, coupled with the emergence of new political forces from civil society with democratic aspirations, led to the end of these pacts. Although consociationalism in Colombia initially had a time limit until the seventies, it was informally extended until the eighties, eventually culminating in the enactment of a new Constitution in 1991 due to popular demand, to correct previous political exclusion (Torres, 2010, 316-330). In Venezuela, political parties were embroiled in several scandals, in addition to economic challenges, and a failed military *coup d'état* in the early nineties, which marked the end of consociationalism (Zapata, 2001).

Consociationalism proved to be useful in both countries for preserving democracy, albeit with a high level of exclusion. However, it effectively contained individualistic political ventures due to party discipline and coalitions between major political parties. Nevertheless, in the nineties, once these coalition pacts were terminated, there were no constraints to prevent the emergence of outsiders with political aspirations.

### **2.2.2. On State Capacity, Autonomous State and Coercion**

Literature recently has pointed out that democracy contributes to the enhancement of state capacity (Wang & Xu, 2018). Thus, both democracy and state capacity complement each other in the long term (Tilly, 2007, 14). State capacity encompasses the activities that a state carries out across its territory to achieve political organization and social peace, thereby facilitating democracy. These activities include providing domestic and international security

through coercion, offering public services such as healthcare and education, constructing nationwide infrastructure, and establishing a bureaucracy that sustains state presence, primarily through infrastructural means and less through despotic power. In the long term, a robust bureaucracy creates an autonomous state capable of resisting the influence of elite interests or unforeseen contingencies (Mann, 1988).

Hanson and Sigman (2021) have elaborated a composite index to evaluate state capacity from the 1960s onwards, based on three key attributes: coercion, taxation, and bureaucracy. In this analysis, Venezuela outperformed Colombia, the latter even registering negative performance for multiple years. However, both countries lagged behind the levels of state capacity consolidation seen in countries such as Argentina and Costa Rica. Cardenas (2010) noted that the concentration of political and economic power in a few hands had reduced the incentives to develop state capacity in Latin America. Recent research has also demonstrated that despite advancements in this area, state capacity and consolidation remain low across the region (Mazzuca & Munck, 2020). Simultaneously, clientelism has impeded the consolidation of state capacity in numerous countries. This is partially due to the practice of providing employment and opportunities to political elites and their constituencies, rather than developing an autonomous apparatus (Centeno, 2009, 166).

Within the framework of consociationalism, relationships with dominant political parties evolved into a source of opportunities. These parties utilized the state apparatus and bureaucracy to reciprocate favors or fortify political and social ties in a traditional clientelist relationship (Stokes, 2013). This served to intensify the politicization and participation of large parts of the population, all hoping for better prospects. In Venezuela, the enormous oil revenues available to the state allowed for the distribution of resources among the entire population. However, the winning party in an election had the privilege of distributing the

best incentives among its followers, including high-income government jobs, easy access to social programs, subsidies, international scholarships, and positions at prestigious universities. This created an inappropriate system, as was asserted by a member of one of the traditional parties: "We have had a political system that has fueled a clientelist system. This system has been so perverse that clientelism has ended up absorbing those who support it" (Zapata, 2001, 215). In Colombia, the shared and alternating political power between the main parties, the Liberals and Conservatives, coupled with limited financial resources, transformed clientelism into an informal channel of interaction between civil society and rulers to advocate for their interests and needs. It also served as a means of gaining access to scarce state financial resources. With a restricted political system, society and citizens had few opportunities to secure good jobs, university positions, subsidies, loans, or social welfare without a political affiliation with dominant parties and their clientelist networks (Archer, 1990).

In Colombia and Venezuela, once a party won the elections, the new president and their party had the implicit right to appoint most mid-level state officers and city mayors across the country. In this context, political elites and the general population were highly motivated to ensure that their party or preferred candidate won the elections to increase their chances of obtaining strategic political positions, state resources, or advantages over their fellow citizens (Davila, 1999, 61-78; Coronil, 1997). In both countries, regular elections for executive and legislative positions, combined with clientelism, contributed to the misallocation of state resources. This particularly hindered the consolidation of an autonomous state with a professional bureaucracy, because it depended on electoral outcomes and changes in political direction. State autonomy is crucial for a country to implement political decisions without undue private influence in the long term (Mann, 1984; Cotton, 1991).

However, in Venezuela during this era, state capacity expanded throughout the country more effectively, propelled by oil resources. This expansion was evident in the development of a national bureaucracy, infrastructure such as roads and buildings, universities, and governmental services, particularly in the latter half of the 20<sup>th</sup> century. Different administrations created a welfare system through subsidies for the population, which helped consolidate social peace for decades (Sabino, 1994). Nevertheless, according to Venezuelan literature, the abundance of resources discouraged the establishment of an autonomous state. A hyper-centralized and bureaucratized framework created conditions for recurrent conflicts between the clientele of political parties and various state institutions over economic resources, undermining state autonomy and the consolidation of a national project (Karl, 1997).

Colombia exemplifies an extreme case of the absence of an autonomous state. State capacities were developed based on two premises. Firstly, it became a source of employment for members of dominant political parties as a form of patronage. Secondly, because of the power wielded by regional elites, a deliberate attempt was made to constrain the authority of the central state (Palacios, 1995). Indeed, in the 1980s and 1990s, numerous illegal groups seized control of certain segments of the state for their own purposes (Arevalo, 2016). Literature has also demonstrated that building infrastructure in this country was challenging due to the complex geography, which, combined with the lack of control over so-called "grey zones," made it difficult to develop effective state capacity across the country (Orjuela, 2000). Thus, the consolidation of an autonomous state was highly challenging.

Although state capacity in Venezuela was much more consolidated than in Colombia, consociationalism and clientelism hindered the chances of establishing an autonomous state in both countries. States were unable to act independently of dominant political parties, which

would have made them more resilient to changes in the economic model, as I will discuss later.

### **2.2.2.1 Coercion as State Capacity**

Coercion is the ultimate expression of state capacity because it guarantees the survival of a country as an independent political entity. States should ideally maintain a "monopoly over military mobilization" within their territory (Mann, 1984, 209). Analyzing the coercion capacity of both states during the Cold War with quantitative data is challenging. However, a qualitative approach can provide insights into military power and coercion in Colombia and Venezuela.

During the Cold War, within the framework of consociationalism, the military in both countries were subordinated to democratic authorities, facing the challenges posed by military rivals that threatened the existence of the state and its fragile autonomy. This political system bolstered military autonomy in both countries, fostering institutional values and professionalism (Varas, 1988). This ensured subordination to civilian authorities while granting the military a range of privileges, such as competitive salaries, the construction of social prestige among civil society, and autonomy in handling security and defense matters, including nearly unrestricted control over military budgets (Bejarano, 2011; Trinkunas, 2005).

To understand civilian militarism, it is critical to highlight the differences between Venezuela and Colombia in terms of military involvement in the political sphere during consociationalism. In Venezuela, military autonomy was contingent on ties with political parties, perpetuating the longstanding tradition of military involvement in politics, locally known as "praetorianism" or the pervasive presence of the military in the corridors of state power (Irwin, 2008). In contrast, Colombia's military became apolitical during

consociationalism due to political pressure and the demanding reality that required their actions to address military threats, effectively keeping them away from political power (Leal, 2005). However, due to the continuous state of emergency declared by bipartisan elites to combat left-wing guerrillas, some experts have characterized the Colombian case as a kind of "de facto" military rule, despite its civilian facade (Raby, 2011, 81). Praetorianism in Venezuela and the state of emergency in the context of internal conflict in Colombia, facilitated the existence of a subtle form of militarism, ready to emerge at the opportune moment.

Coercion, as the ultimate expression of state capacity, was tested during the Cold War in Colombia and Venezuela. Both countries confronted left-wing guerrilla movements advocating for radical political changes in response to the exclusion under existing political regimes. However, there was a significant difference in the circumstances and outcomes. In Venezuela, the guerrillas were defeated as early as the mid-1960s through a combination of civilian state action and military coercion. This approach included the enhancement of infrastructure and services for the population, aimed at mitigating social unrest. These efforts were made possible thanks to available resources (Levinson, 2021, 155). In Colombia, on the contrary, multiple left-wing guerrillas proved militarily unbeatable but were also incapable of defeating the state. Moreover, the political elites showed little interest in improving social services to address public dissatisfaction (Safford & Palacios, 2002, 354-360). This situation had different impacts in each country. In Colombia, anti-communism became a dominant doctrine within the military, encouraging the defeat of left-wing guerrillas by any means, even resorting to dirty war tactics that persisted within the institution (Rodriguez, 2013). In Venezuela, the early defeat of left-wing guerrillas resulted in the gradual shift from an anti-communist discourse within the military to a nationalist-developmental doctrine. This new

approach incorporated leftist ideas within an anti-imperialism narrative (Åsedotter, 2016). While the Colombian military was contending with various existential threats to the state during this period, in Venezuela, the military gradually transformed into a geostrategic think tank with autonomy from political elites. This transformation included the emergence of radical groups like the Bolivarian Revolutionary Movement-200 (MBR-200), founded by Hugo Chavez in 1982.

In both cases, coercion ensured the survival of these states. However, in Colombia, this was tenuous due to the inability to defeat the multiple left-wing guerrillas and other illegal actors over time. In Venezuela, the military played a pivotal role in ensuring the state's survival and autonomy, enabling the development of other infrastructural state services that promoted social peace over the years. Surprisingly, subordination to civilian authorities constrained any kind of military reform in both countries, a situation different from what occurred in other countries in the region after dictatorships or civil wars. This factor contributed to the emergence of civilian militarism, with an exacerbated role for military power some years later.

In conclusion, state autonomy was fragile in both countries. Meanwhile state capacity was relatively better in Venezuela than in Colombia, it never achieved a high level of consolidation. Nevertheless, in both countries, the state's existence and survival were guaranteed during consociationalism thanks to the state coercion apparatus. The military was more effective in Venezuela than in Colombia, partly due to the availability of resources and the less pronounced exclusion within this political regime. Undoubtedly, the economy played a critical role, as I will explain in the next section.

### **2.2.3. Economy as Critical Leverage**

For decades, capitalism in its various forms has served as a cornerstone of liberalism in Latin America, arguably even more so than democracy. This has evolved from classical liberalism in the 19<sup>th</sup> century to protectionist capitalism during the Cold War, and more recently, neoliberalism in the nineties of the 20<sup>th</sup> century. In this section, I will provide a brief analysis of the economies of Colombia and Venezuela, their connections to the world economy (Wallerstein, 2004), and how these factors played a critical role in the emergence of civil militarism, surpassing other influencing factors.

Economic factors are crucial in driving change, especially in these cases. Mann argues that "the social change economies produce is rarely swift or dramatic, unlike military power. It is slow, cumulative, and ultimately profound" (2013, 1). Building on this idea, I argue that the emergence of alternative political projects with a civil militaristic character in Colombia and Venezuela did not result from abrupt changes like coups, revolutions, civil war ends, or democratization processes, as observed in other Latin American cases (Garretton, 1997). On the contrary, the emergence of these alternative political projects was a gradual process spurred by the influence of economic changes promoted by political elites and their connections to the world economy. These transformations were bolstered by international organizations and the United States in the pursuit of the neoliberal economic model, which progressively exacerbated pre-existing political and social shortcomings. Therefore, the significance of both cases lies in the fact that they were democratic regimes undergoing the upheavals of neoliberalism, resulting in distinctive political processes and outcomes.

Capitalism is an integral aspect of the contemporary world, globalizing capital flows, trade, and production chains (Mann, 2013, 1). During the Cold War, Colombia and Venezuela were deeply integrated into the world economy, functioning as independent units within the

division of labor as providers of raw materials. Wallerstein suggests that the capitalist economy is not simply governed by the invisible hand of the market; on the contrary, it functions effectively only under a strong relationship between economic actors and holders of political power (2004, 24). Typically, changes in the economic model are orchestrated by political elites and are not exclusively driven by economic rationality, an important consideration for the subsequent analysis.

During this era, capitalism operated smoothly in Colombia and Venezuela due to demand and supply interactions, and because political elites actively promoted a capitalist economy. However, these economies operated within a dependent relationship that manifested in various shortcomings, including high inequality, limited industrialization, and restricted employment opportunities for their populations (Thorp, 1998, 372). Nonetheless, Venezuela had a more advantageous position in the world economy, primarily due to its significant oil production. This factor made Venezuela crucial for industrial capitalism during that period, generating substantial revenues for the country. In contrast, Colombia had a more modest integration into the world economy, relying on irregular revenue streams coming from coffee exports.

Between the 1950s and the 1980s, oil represented between 94% and 79% of Venezuela's total exports, leading to unprecedented revenue levels. To illustrate, following the 1973 Oil crisis, Venezuela became one of the top oil producers in the world. Through political maneuvers, such as nationalization to increase oil prices, revenues tripled, reaching 10 billion for the state coffers in less than three years (Martz, 1977). In Colombia, coffee became the country's primary commodity and a part of its national identity, accounting for 72% to 54% of total exports between the 1950s and 1990s (Thorp, 1998, 367). However, due to price fluctuations in this commodity, Colombia diversified its exports, unlike Venezuela (Ocampo, 2000).

Oil and coffee became pivotal for these economies. In response, political elites recognized this situation and supported the establishment of international organizations to provide economic stability amid international market fluctuations. Venezuela played a leading role in the founding of the *Organization of the Petroleum Exporting Countries* (OPEC) in 1960, a decisive move that solidified its economy and enhanced its international prestige (Mommer, 2016). OPEC played a crucial role in regulating oil production by establishing quotas. In Colombia, the creation of the *International Coffee Agreement* in 1962 was critical for regulating and guaranteeing coffee export quotas among producers (Croce, 1992). This allowed to stabilize the Colombian economy, and revenues were invested in both the public and private sectors across various domains. Membership in these intergovernmental organizations allowed both countries to navigate market fluctuations and plan their economic future as never before.

Interestingly, Colombia diversified its domestic economy, whereas Venezuela, due to its cost-effectiveness compared to local production, relied on imports. This rendered Venezuela highly dependent on oil revenues and foreign products. The quota system within the world economy, sponsored by political elites, played a vital role in ensuring economic stability despite international market fluctuations in both countries. Although Venezuela became more prosperous, Colombia was less dependent on international market fluctuations, although its economic performance remained modest.

#### **2.4. Neoliberalism, Instability, and Collapse**

In the late 1980s and the early 1990s, Colombia and Venezuela, like the rest of Latin America, experienced significant economic instability. The region faced economic problems, including the debt crisis of the 1980s, soaring unemployment rates, poor macroeconomic management, and the inability of these economies to improve their performance (Bertola & Ocampo,

2012). The protectionist model, which aimed to shield domestic production by promoting the creation of a local market, collapsed due to excessive state intervention, corruption, and the inability to foster economic growth through innovation.

In response to these challenges, neoliberalism was introduced as a set of economic reforms in Latin America, serving as a radical solution to address perceived market imperfections attributed to pernicious state intervention and to partly solve the debt crisis of the 1980s. This included cutting the state budget, limiting the provision of state goods such as health and education services, privatizing state industries, and opening the economy to foreign investment and goods by eliminating protectionist barriers (Lander, 2007). These were carried out on the assumption that state intervention had hindered economic growth and prosperity for the population. As a whole, neoliberal reforms aimed to decrease state involvement across society, particularly in the economy, by reducing social expenditure and opening the domestic economy to foreign investment and trade. However, these reforms, implemented eagerly by political leaders, led to social, economic, and political unrest (Grugel & Riggirozzi, 2009).

Within the context of economic liberalism, particularly neoliberalism, a notable contradiction emerged. While political and economic elites in core countries advocated for radical market liberalization and the dismantling of trade barriers in peripheral nations, promoting free trade as a solution to political, social, and economic disruptions, certain items such as heroin, cocaine, and marijuana were banned and targeted for prosecution. These restrictions were based on non-economic considerations despite the belief in the benefits of the free market, often rooted in moral concerns rather than the economic principles of profit and free choice. (Levine, 2003). This contradiction was striking: endorsing free trade on the one hand, while actively promoting non-economic constraints on these illegal goods on the other hand, fueled

armed conflict, particularly in Colombia, due to the enormous resources that illegal groups acquired to sponsor their fight against the state (Torres, 2008, 339-362).

Thus, Venezuela experienced prolonged social unrest that erupted in the late 1980s, marked by large-scale protests against the implementation of neoliberal reforms (DiJohn, 2004, 5). In contrast, Colombia's economy grappled with the consequences of deindustrialization; illegal funds from drug trafficking helped mitigate the economic downturn. Paradoxically, this illicit influx of funds led to unforeseen consequences, including heightened violence due to increased resources available to various illegal armed groups to carry out military activities. While the Colombian economy experienced a severe crisis in the late 1990s, the drug trade temporarily offset the economic effects of neoliberal reforms, even as it exacerbated violence (Safford & Palacios, 2002, 315).

Economic shifts, particularly the adoption of neoliberal reforms, precipitated the deterioration of social and economic conditions in both countries, albeit with varying degrees of intensity and implications. In Venezuela, economic crises triggered popular responses that paved the way for political transformations. In Colombia, the contradictions of neoliberalism manifested in the demand for unrestricted circulation of goods while condemning illegal products like cocaine and heroin. This paradoxical situation resulted in the flow of substantial amounts of money, countering the economic impacts of neoliberal policies, but concurrently contributing to increased violence (Saenz, 2011, 107). This environment of contradiction had an impact on the deterioration of state capacity in both countries, although in different areas.

#### **2.4.1. State Capacity and Neoliberal State**

In both Colombia and Venezuela, the challenges of establishing an autonomous state proved to be difficult, making them susceptible to various issues, including those arising from crises and new policy directions like neoliberalism. Recent literature has highlighted the adverse

effects of implementing the "neoliberal state" during the 1980s and 1990s on state autonomy and consolidation. Neoliberal reforms were rooted in neoliberal principles that advocated for a minimal state, paradoxically eroding state capacity over the medium term with harmful consequences (Mann, 2012, 322-360; Fukuyama, 2022, 28). While much attention has been given to the economic consequences of neoliberalism in the region related to deindustrialization, poverty, impact on quality of life, and deterioration of public services such as health and education, its impact on state matters has received comparatively less scrutiny, despite its significance (Rodriguez, 2021; Grugel & Riggirozzi, 2012).

Within the spectrum of neoliberal thought, a significant faction called for the dismantling of the state to alleviate public debt, which involved reducing bureaucracy and minimizing state involvement in managing services and industries (Harvey, 2020). These actions indirectly diminished state capacity in remote regions that relied on state services and industries for essential functions. This hindered state consolidation efforts, particularly in critical areas such as healthcare, education, justice, and public security. Local political elites subscribed to this aspect of liberalism, aligning with recommendations from international institutions like the International Monetary Fund (IMF), as they believed that an oversized bureaucracy impeded state efficiency (Bulmer-Thomas, 2013).

Examining data from Hanson and Sigman (2021) on state capacity, it is evident that both Colombia and Venezuela experienced fluctuations in state capacity performance from the 1980s onward. In Venezuela, this deterioration commenced in that decade and deepened in the 1990s, followed by a decrease in the latter half of the decade. Colombia, on the other hand, witnessed a consistent decline during the 1980s, with a brief recovery in the early 1990s, followed by a pronounced decrease in the latter half of the decade. However, establishing a direct correlation between the application of neoliberalism and the

deterioration of state capacity is not straightforward, as both economies faced significant fluctuations during those decades. World Bank data on GDP growth reveals more substantial variations in Venezuela than in Colombia, and the privatization of state-led enterprises could have introduced additional economic resources into the overall data (see Figures 2.1 to 2.4). Nevertheless, quantitative data can assist us in assessing the impact of neoliberalism on state capacities based on factual information.

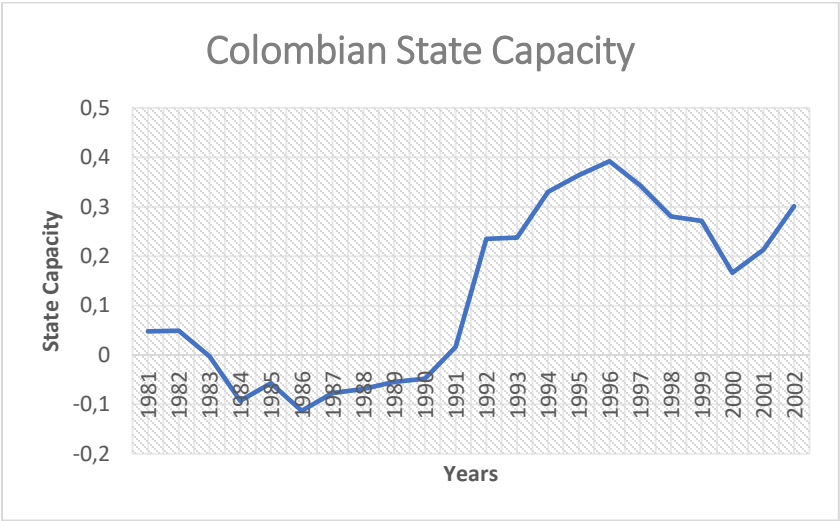


Figure 2.1. Source (Hanson and Sigman, 2021)

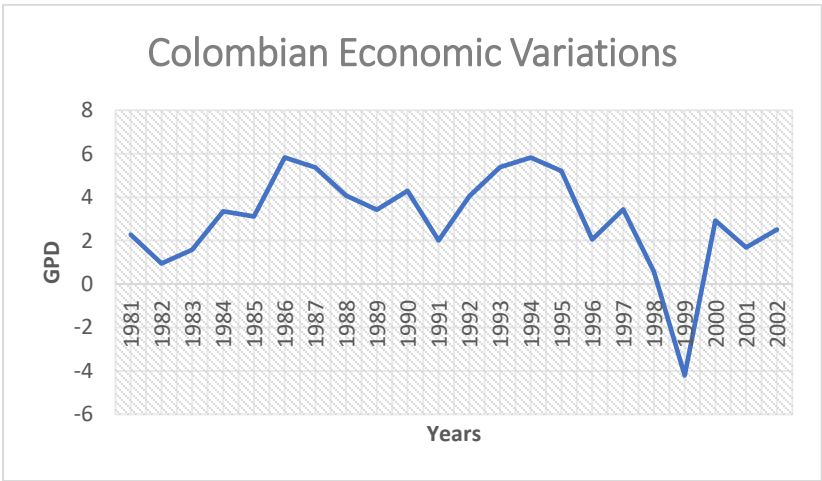


Figure 2.2. Source (World Bank)

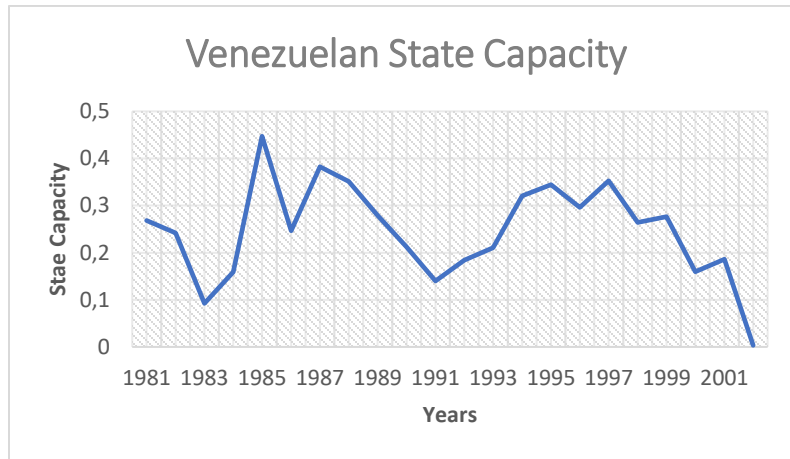


Figure 2.3. Source (Hanson and Sigman, 2021)

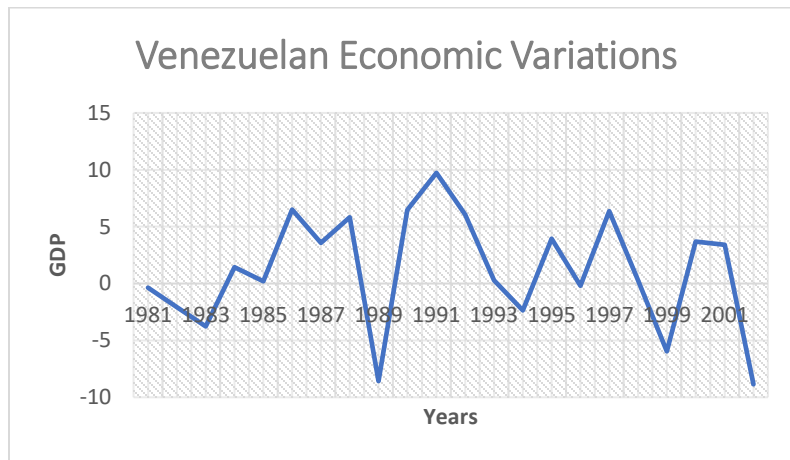


Figure 2.4. Source (World Bank)

Venezuela and Colombia serve as contrasting examples of the application of neoliberal reforms within the region. In Venezuela, the continuous expansion of a bureaucracy that served the interests of bipartisan clientelist networks eventually led to a collapse when oil revenues dwindled in the late 1980s (Karl, 1997). This economic downturn provided a pretext for reducing drastically state and public spending, resulting in a series of measures, including privatizations and reductions in subsidies that affected a significant portion of the population (Di John, 2005). As part of these reforms, essential public services such as justice and law enforcement were neglected, following years of social instability (SanJuan, 2008). An explicit deterioration in state capacity occurred.

In comparison, Colombia presented an intermediate case in terms of the extent of bureaucratic expansion and the implementation of neoliberal reforms to reshape the state. Driven more by recommendations from international organizations than by a domestic economic crisis, Colombia adopted neoliberal principles. Although radical privatization efforts targeted essential services such as healthcare, retirement plans, and education, the civil society response remained subdued and led by select groups like labor unions. These reforms were carried out under the promise of addressing the challenges the state was facing. During this period, Colombia found itself embroiled in a downward spiral toward a "failed state" status, as the country grappled with an armed conflict fueled by the resources of the illegal economy. The state's authority competed with that of "para-states" established by illegal groups in remote regions, and widespread violence hindered effective governance (Rodriguez & Sanchez, 2022).

In this context, characterized by fragile autonomous states, the implementation of neoliberal reforms and its contradiction had a detrimental effect on state capacity in both Colombia and Venezuela. Thus, reforms and unintended consequences of neoliberalism paved the way for political projects that capitalized on promises of sweeping change, appealing to a populace disenchanted with the status quo.

#### **2.4.2 The Spiral of Chaos in Venezuela and Colombia**

As I mentioned earlier, governments acting on behalf of liberalism have often utilized military power and militarism to achieve the goals of this model. Therefore, the tendency to create harmony is not always a by-product. On the contrary, under the paradox of this model, militarism frequently becomes an alternative.

Initially, military power was employed as a response to specific instances of social unrest in Venezuela and the turmoil instigated by the illegal drug trade in Colombia under neoliberal

logic and contradiction. However, the emergence of civilian militarism in these countries can be understood as a complex outcome of the interaction between political and military forces, driven by the pursuit of increased power to rebuild state capacity affected by neoliberalism, as I will explain in the coming chapters. This dynamic can be seen as both a political reaction of military power in Venezuela against the adverse effects of neoliberalism and a military response of political power in Colombia to challenges arising from the dark side of neoliberal logic and consequences.

In Venezuela, disruptions in its interaction with the world oil market led to social, economic, and political turmoil that overwhelmed consociationalism. In 1989, faced with a deepening economic crisis, President Carlos Andrés Pérez implemented a set of neoliberal reforms recommended by the IMF, including social spending cuts, customs duty eliminations, privatizations, and deregulation of gasoline prices. This sudden increase in fuel and basic goods prices sparked the *Caracazo*, a violent riot fueled by public outrage. In response, the government declared a state of emergency and deployed the military on the streets, resulting in abuses and killings. Junior officers within the military were among those who questioned radically this approach (De Freitas, 2015).

Amid ongoing economic, political, and social chaos, Chávez and a group of officers carried out a failed coup d'état in 1992, during a year marked by two such attempts (Nesbet, 2021). Despite the failure, Chávez's movement gained popularity among the population due to its nationalist, anti-neoliberal, anti-clientelist, and anti-consociationalist discourse. Thus, in 1998, Chávez was democratically elected on the promise of enacting a new constitution and addressing the country's structural problems. The constitution received popular support and was approved in 1999 (Rodríguez-Franco, 2006). This complex interplay between military

and political forces, coupled with the use of militarism to amass power, laid the groundwork for the transformative ascent of Chávez and his movement in Venezuela.

In Colombia, the implementation of neoliberal reforms in the early 1990s, known as *apertura económica* or economic liberalization, followed the guidance of the IMF and encompassed various measures such as opening the domestic economy, liberalizing interest rates, reducing social spending, privatizing state services, and selling state-owned enterprises (González, 2011). This policy trajectory led to significant social and economic upheaval (Herrera, 2020). However, the most profound economic consequences were somewhat delayed, partly due to the substantial influx of resources from the illegal drug trade that provided some relief by creating employment opportunities and diversifying the Colombian economy (Arango, Misas, & López, 2005).

In 1991, Colombia enacted a new constitution following a civil society movement. This constitution introduced progressive mechanisms to include marginalized groups in the democratic game, established guarantees for the rule of law, provided tools for civilian oversight of the military, and aimed to protect citizens' rights (Garzón, 2017). However, the contradictions of neoliberalism led by core countries manifested in Colombia, resulting in chaos and almost the destruction of the state apparatus. The illegal drug trade fueled economically powerful cartels like those in Medellín and Cali (Torres, 2010, 428-432). Additionally, left-wing guerrillas, particularly the Revolutionary Armed Forces of Colombia (FARC), gained control over the trade of these illegal goods and pursued a radical military path to political power (Leech, 2011, 56-103).

Between 1995 and 2000, the FARC showcased its strength by overcoming well-trained Colombian military units including jungle battalions and counter-insurgency units. Throughout this period, the Colombian state appeared on the verge of collapse, and state

capacity was severely compromised. An unsuccessful attempt at peace negotiations further exacerbated the chaos (Torres, 2008, 339-362). The delayed impact of earlier neoliberal reforms struck Colombia during the 1998-1999 economic crisis. This period was characterized by extensive unemployment in the formal sector, an influx of cheap imported goods that devastated local industries, and a bankrupt banking system that contributed to an economic downturn (Echeverria, 2001; Thoumi, 2002).

In this disastrous scenario, the U.S. government supported a military contingency plan known as “Plan Colombia” to counteract the activities of the FARC. Álvaro Uribe emerged as a political figure offering to reshape the relationship between political and military power, promising stability to elites through a civilian-military partnership. Uribe's approach, backed by the civilian leadership and characterized by militarism, aimed to counter the aggressive left-wing forces and ensure the continuity of liberalism (Leech, 2011, 105-148).

While both Venezuela and Colombia experienced the destabilizing effects of neoliberalism, their responses diverged. In Venezuela, civilian militarism under Chávez aimed to counteract the negative impact of neoliberal reforms and strengthen the role of the state in the country. In Colombia, Uribe's civilian militarism was presented as a radical solution to tackle the erosion of state capacity and counter the provocations from left-wing guerrillas, ultimately striving to maintain the country on the liberal path.

## **2.5. Conclusion**

Colombia and Venezuela both developed stable but fragile democratic regimes under consociationalism. While it represented a form of democratic consolidation, the consolidation of the state was weaker. This was partly due to the same dynamics of bipartisan coalitions through clientelism that hindered the establishment of an autonomous state capable of addressing contingencies or the political interests of certain groups. With subordinate but

unreformed military forces, these countries relied on their military apparatus as the most effective means of ensuring the survival of these regimes, which, without directly intervening in political power, could maintain a certain level of prestige among the population.

The erosion of political pacts, coupled with the emergence of neoliberalism as a set of economic reforms or contradictions, impacted state capacity. In Venezuela, neoliberal reforms, including reductions in budget and bureaucracy, harmed state capacity and social well-being. In Colombia, the deterioration of state capacity occurred as a direct result of the contradiction of neoliberalism. Despite promoting free market ideals, the elites in the core countries sponsored the banning of illegal drugs. This prohibition promoted its trade in the black market, increasing the economic capabilities of illegal military groups that further deteriorated state capacities in Colombia. In this chaotic scenario in both countries, the stage was set for political actors offering radical solutions to address economic and social problems in Venezuela and the internal conflict in Colombia. These candidates, after taking office, could utilize military power, not only due to its prestige but also because of their own political perspectives, to address the state capacity issues. I will discuss this further in the next chapter.

## CHAPTER 3

### POLITICAL POWER, STRATEGIES AND MILITARISM

#### 3.1. Introduction: Civil Militarism as a Tool to Retain Political Power

In scholarship on democratic regimes, two recent concerns have emerged: the erosion or backsliding of democracy and militarism. Among these studies (Gamboa, 2022; Bermeo, 2016; McCormack & Gilbert, 2022; Zafirovski, 2020), few have explored how presidents unfold long-term strategies to retain political power, including the transfer of power to close political allies once their tenure has ended.<sup>2</sup>

According to Mann, power is 'the capacity to get others to do things that otherwise they would not do', and through political power, incumbents can use and deploy laws and regulations that are very difficult for subjects to evade (Mann, 2013, 1-2). Militarism seems to be one of the most notorious but less studied forms “to get others to do things that otherwise they would not do” that, once incorporated into political strategies, ends up deteriorating democracy in the long term, both are mutually effective to retain political power by incumbents with reformist aspirations as I will intend to show in this chapter.

A renewed interest in studying militarism across the world but particularly in Latin America has boomed, which includes several topics, among them: how militarism has impacted the militarization of security apparatuses (Robledo, 2022; Solar, 2021; Flores-Macías & Zarkin, 2021); the influence of multitask roles of armed forces of Latin America in other regions (Martinez and Bueno, 2023); how militarism in the region has been analyzed by the US academia (Casal, 2022); the impact of militarism on the deterioration of intelligence apparatuses (Matei, 2023); and the seminal studies of Diamint (2015) on the militarization

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<sup>2</sup> This is a phenomenon that happened also in Russia, known as “tandemocracy”, See Hale, Henry and Colton, Timothy (2008) *Russians and The Putin-Medvedev “Tandemocracy” A Survey-Based Portrait Of The 2007-08 Election Season*. Seattle, University of Washington.

of police and the co-optation of armed forces by political leaders, and my previous work, Rodriguez (2018) on civilian militarism as a strategy of militarization backed by democratically elected authorities. The concept of militarism is elusive, but I will understand particularly civilian militarism as the promotion of militaristic values related to war and the preparation of war by civilian elected authorities (political power) to fulfill their political ends, using military power together with actions, attitudes, and societal norms. Militarism goes hand in hand with the concept of militarization which according to Cynthia Enloe is a process that makes people assume practices and ideas of militarism (2016 11-12). Despite random mentions, the recent literature omits how militarism emerges as a response to crises and as a strategy of democratic leaders to retain political power, facilitated by established political institutions and traditions.

In the previous chapter, I demonstrated causal evidence linking the emergence of radical political projects to the impact of neoliberalism in the weakening of the state capacity added to other factors such as political and social crises. These factors collectively foster leaders with strong ambitions who incorporate militarism into their strategies to be elected democratically. The main goal of these strategies was, on one hand, to increase state capacity, and on the other hand, to retain political power under the argument of the necessity for political continuity to consolidate this capacity. However, while the Bolivarian strategy in Venezuela proved to be effective in retaining political power until today, the Democratic Security strategy in Colombia was time limited. In this respect, the main question of this chapter will be: why, despite the initial popularity of the strategies of Chavez and Uribe, did Colombia not transition to an authoritarian regime while Venezuela did?. This is important to understand how civilian militarism was implemented and endured in the context of democratic regimes.

Following this question, I aim to prove that presidentialism, combined with certain political traditions in Colombia and Venezuela, provided the necessary political instruments for presidents to implement their strategies. These gradually incorporated militarism without undermining democratic institutions with a civilian trait. However, in the long run, this led these countries toward an authoritarian scenario that without proper democratic constraints, resulted in the aggrandizement of executive power to control all political institutions, as happened in Venezuela. On the contrary in Colombia, this did not happen thanks to the counterbalance exerted by other political powers and the autonomy of the political successor, who had the chance to act independently from his godfather. Thus, this chapter will explore political power, strategies, and militarism in Colombia and Venezuela from the early 21<sup>st</sup> century to 2016.

Firstly, I will explore how civilian militarism was used as a tool to retain political power by incumbents. Secondly, I will examine how crises became turning points, bringing radical political movements to power. Thirdly, I will explore how presidentialism, coupled with popularity, provided significant flexibility to implement diverse political initiatives. Fourthly, I will study how political strategies aimed to transform local realities. Fifthly, I will analyze how political strategies interacted with military power, including the creation of a militarist leadership and the identification of an enemy. Sixthly, I will assess how incumbents managed to prolong their strategies through re-election and leave a political capital legacy to their successors. Finally, I will draw a brief conclusion.

### **3.2. Crisis as a Turning Point**

The literature agrees that crises become critical turning points (critical conjunctures) that change the course of certain political behaviors (Falleti & Lynch, 2009, 1154-1155). In this scenario, there is an increase in "causal possibility" in which agents can influence the

outcomes and trends in these countries from that point onward (Soifer, 2012, 1574). In this study, agents transformed the way democratic regimes operate and interact with other domains. Changes in the political landscape, together with economic and state capacity crises, created opportunities for radical political alternatives (Ginsburg & Huq, 2019; Weyland & Madrid, 2019). In Colombia and Venezuela at the turn of the new millennium, Chavez and Uribe came to power due to a combination of crises, as I have previously demonstrated. Thus, the election of these presidents provided certainty with their strategies during uncertain times. Balderacchi has suggested that parties and state coercive capacity provide some support to keep incumbents in political power for a while (2018). However, explanations for the emergence and continuity of their projects are still weak, as well as, why some of these projects are reinforced over time while others could not. In this regard, troubled times can explain how these candidates emerged. The literature has also identified that institutional arrangements impact the way that these kinds of leaders emerge inside democratic regimes, while simultaneously enabling them to implement their plans (Carreras, 2012).

Chavez and Uribe were elected as presidents in different years, 1998 and 2002 respectively. The struggle for political power began as a radical contest between remnants of traditional political parties and these candidates, who promised radical solutions under difficult circumstances. Chávez was one of the military leaders in the failed *coup d'état* of 1992 in Venezuela, and he capitalized his involvement in this plot to run for the presidency a few years later. Chavez promoted a political campaign focused on two radical goals. Firstly, the resignation of the legislative power to elect a new one due to its high level of corruption, and secondly, the adoption of a new constitution through a constituent assembly aimed to address issues stemming from the previous political regime and the neoliberal reforms. This politician

had no connection with traditional political parties and framed his candidacy under the support of *Movimiento Quinta Republica* (MVR) [Fifth Republic Movement]. Being electorally backed by a multi-party coalition called *Frente Patriotico* [Patriotic Front] enabled him to defeat traditional parties in the 1998 election (Gott, 2000). In Colombia, Uribe was one of the most radical critics of the failed peace talks with the FARC, during the government of Andres Pastrana. As a renegade from the Liberal party, he ran for the presidency with his political party called *Primero Colombia* [Colombia First]. However, curiously, this party was formed by members of traditional parties. Uribe's discourse included warlike rhetoric to confront the FARC through radical methods while strengthening state power to guarantee democracy and capitalism (Rodriguez, 2006, 460). Thus, their political initiatives appealed to the masses during troubled times.

Siavelis and Morgenstern (2008) pointed out that the political behavior of presidents is shaped "by the processes that bring them to power," which will be explored in the upcoming sections. In this regard, if crises act as triggers, existing institutional arrangements allow them to democratically come to power and stay there.

### **3.3. Institutions and Traditions**

Chavez and Uribe reshaped the political landscape in Venezuela and Colombia. They came to power without the support of traditional parties, which were facing troubles or experiencing fragmentation during the time of their election. The literature refers to these politicians as outsiders. Juan Linz describes them as candidates who lack political identification and do not receive support from traditional parties (1994, 26). This characteristic allowed them a high degree of flexibility in pursuing their political goals, influenced in part by the institutional design of each country (Carreras, 2012), as well as some unique factors that I will explain below.

### **3.3.1 Presidentialism & Popularity**

When Chavez and Uribe were elected, both countries had established and solidified democratic regimes. Despite their imperfections, these regimes remained stable and developed long-lasting institutions (Bejarano, 2011). The Political Constitution of Venezuela of 1999 and the Political Constitution of Colombia of 1991 served as frameworks for presidentialism at the turn of the new millennium. Under this type of system, the president had the opportunity to amass political power, hold national authority for a fixed term, implement public policies, and determine the fundamental principles for organizing society and the political framework. This granted the president significant autonomy in achieving their political goals (Garcia, 2011), although as I show earlier presidentialism was present a long time ago.

Recent literature has highlighted the detrimental effects of presidentialism on the democratic process. This stimulates the concentration of power in a single position and reduces the likelihood of decision-making based on consensus among various political and social forces (Ganghof, 2021, 148-167). Furthermore, the vast political latitude enjoyed by incumbents often leads to a predisposition toward authoritarianism (Cheibub, 2006, 136-164). Linz argued that the limited quality of democracy and the longstanding tradition of authoritarianism in Latin America stemmed from an overextension of presidential powers vis-à-vis the legislative and judicial branches. In this context, incumbents tend to assert themselves as representatives of the popular will, bolstered by electoral support (Linz, 1990). This tendency exacerbates their power, which becomes difficult to challenge.

However, incumbents such as Chavez and Uribe also sought to gain control over legislative autonomy through various strategies. At times, these attempts were countered by independent opposition, resulting in a gridlock between the executive and legislative powers, severely

detrimental to democracy (Carreras, 2014). Scholarly research has discussed the drawbacks of the institutional design of presidential systems in terms of democratic deepening, including the excessive control exerted by the executive (Haggard & Kaufman, 2016; Carmines and Fowler, 2017). Nevertheless, other authors argue that hegemonic ambitions can be countered with appropriate checks and balances, such as limiting executive interference in the legislative branch, fostering strong party discipline, and empowering civil society (Mainwaring & Shugart, 1993).

In an era marked by the fragmentation of political parties and a decline in party discipline, Chavez and Uribe rose to political power in Venezuela and Colombia. They did not belong to established or longstanding political parties with strong ideological principles. Instead, they emerged as candidates supported by newly formed parties that focused primarily on personalized political strategies offering appealing solutions to the voters. These political parties served as legal platforms for their presidential campaigns, but their influence waned thereafter. In Colombia, Uribe utilized the *Primero Colombia* party as a political vehicle, this evolved into a personalized organization focused solely on the presidential figure. Similarly, in Venezuela, Chavez relied on the *Movimiento V República* (MVR). During the first decade of the 21<sup>st</sup> century, both presidents adapted their political strategies to the dynamics of domestic politics, securing their grip on power through direct support from their respective voter bases.

Linz (1994) emphasized that outsider candidates tend to resonate among citizens by rejecting traditional parties and their perceived shortcomings while seeking support for their own candidacies and political strategies. However, a more comprehensive perspective has been put forth by Isidoro Cheresky, who introduced the concept of "leadership of popularity." This concept highlights the relationship between incumbents and citizens, this author explains:

[...] the leaderships of popularity lack solid organizational support and cannot usually mobilize masses in other periods. The contemporary leadership of popularity is sustained by a direct bond with public opinion, with few institutional intermediations. Considering that its primary support is based on opinion, this means that citizens who support this political cause lack a defined sense of political belonging. They support the leaders for their capacity to embody their ideas in each scenario, but their preferences may vary when this scenario is reconfigured (Cheresky, 2012, 19).

Understanding popularity-based support is crucial to comprehend the progressive accumulation of power within these regimes and its impact on the respective countries. However, the creation of a political party in the process played a significant role in prolonging Chavez's political strategy compared to the situation in Colombia. Under Chavez's leadership, a united political party, the *Partido Socialista Unido de Venezuela* [United Socialist Party of Venezuela], was formed in 2008 to bring together all left-wing forces. This cohesive party encompassed a well-defined set of political ideas closely aligned with Chavez's own (Brewer-Carias, 2010, 369). In contrast, in Colombia, internal disputes and divisions among Uribe's political allies resulted in fragmentation and the creation of several political parties, including *Partido Primero Colombia*, *Partido de la U*, and *Centro Democrático*, which emerged after Uribe left the presidency. This lack of political cohesion and support for Uribe's original core ideas contributed to the dilution of his initiatives over time. Thus, the consolidation of Chavez's initiatives was facilitated by the existence of a unified political party.

During their presidencies, Chavez and Uribe shared certain similarities. They both attained high levels of popularity among the population. Both leaders assumed power in extremely turbulent circumstances marked by crises and profound instability. They addressed these challenges through a combination of charisma, authoritative leadership, and personalized management, offering temporary solutions to political, social, economic, and security

problems. The region's financial boom during the first decade of the 21<sup>st</sup> century bolstered their ability to consolidate popular support and implement their strategies (Guisán, 2010). The revenue generated from the export of commodities provided these incumbents with ample funds to enhance clientelism and allocate significant resources to social spending. Programs such as *Misiones* in Venezuela and *Familias en Accion* in Colombia aimed to provide economic support to vulnerable people, leading to the cultivation of a loyal support base at the polls (Langue, 2006; Blanco, 2013; Alvarez, 2011). This combination of support from both established and new constituencies contributed to their repeated electoral victories. Various sources indicate that their popularity ratings fluctuated between 55% and 80% throughout their terms, representing unusually high favourability ratings within their respective countries and ranking them among the most popular leaders in Latin America.<sup>3</sup> Popularity played a critical role in securing the political support that allowed both Chavez and Uribe to win multiple elections and maintain their hold on power. While Gamboa argued that popularity alone is insufficient to guarantee the erosion of democracy (2022, 93), it did provide the necessary backing for both leaders to democratically ascend to power and implement their political strategies (Velasco et al., 2021). In both Venezuela and Colombia, popularity translated into tangible support at the polls. Then, in some respect popularity matters to keep these incumbents and strategies in power.

For instance, in 2000, Chavez garnered 59.76% of the votes to solidify his position as president after the enactment of the new constitution in 1999 (Consejo Superior Electoral, 2001). In the 2006 presidential re-election, he achieved a similar electoral victory with 62.87% of the votes, compared to 36.88% for his closest political opponent (Venezuela,

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<sup>3</sup> See Consultora Mitofsky, “Aprobación de mandatarios: América y el mundo available at <http://www.consulta.mx/web/> (Retrieved April 12<sup>th</sup>, 2021).

2006). Likewise, in Colombia, Uribe secured a significant majority of 62.35% in the 2006 election following the approval of his second term by the legislature, while his contender received only 22.02% of the votes (Misión de Observación Electoral, 2010, 10). However, Uribe also faced electoral setbacks, such as the referendum on constitutional amendments at the beginning of his first term, which he ultimately lost (Amezquita, 2008).

The electoral results granted these incumbents significant leeway to accumulate political power based on their political ideas, personality, and perceived accomplishments during their tenure. After a decade in power, one primary source described how Chavez's party achieved a majority in the Venezuelan National Assembly, largely due to Chavez's prestige, which afforded him substantial political power to make crucial decisions for Venezuela with minimal opposition (Chinas, 2010). One pivotal decision was the approval of indefinite re-election, initially supported by the legislature and later ratified in the 2009 referendum. This allowed Chavez to run for the presidency indefinitely and carry out his plans with a diminished opposition (Márquez, 2009). Similarly, Uribe received support from various sectors of society, particularly the middle class, businesspeople, and powerful landowners, resulting in consistently high approval ratings despite criticism about human rights abuses (Cruz, 2018).

Occasional assertions in the public sphere have contended that the masses were manipulated into voting for these incumbents, implying that these individuals lacked agency in their electoral choices. However, reputable organizations such as the *Carter Center* and the *Brookings Foundation* have noted on different occasions that while some irregularities occurred during Chavez's era, there was no evidence of open fraud to secure election victories, and citizens were actively involved in the election of Chavez and his political allies (Corrales, 2011, 1-3; Carter Center, 2012). Similarly, during Uribe's re-election in 2006, the

Electoral Observation Mission (MOE), an independent organization comprised of international and domestic observers, deemed the election to have been conducted in a free and fair atmosphere. However, in some remote areas of the country, illegal armed groups exerted pressure on the population's will (Launay-Gama, 2006).

### **3.4 Political Strategies as Shock Therapy: Remedy and Disease**

Colombia and Venezuela found themselves at a critical juncture at the turn of the new millennium for several reasons. Chavez and Uribe emerged as radical alternatives, promising swift changes in their respective countries and successfully persuading most voters to choose them. What sets these two politicians apart are their presentation and implementation of political strategies. This is a concept critical to this dissertation, although it tends to be difficult to define (Biddle, 2015). In this regard, I will construct a definition based on what some authors have noted. Political strategy will be defined as an organized, goal-oriented effort intended to induce changes in the political arena to transform or reform current trends (Paquette, 2002; Trejo, 1993). In this context, another set of ideas that will be useful for this section was proposed by Nina Silove (2018), although originally focused on grand strategy, the core ideas are important for this analysis. She mentions that usually strategies have a long-term scope, a holistic perspective that considers all state resources to fulfill it, and the making of trade-offs to advance a state's most vital interests (2018, 46-47). Chavez and Uribe extended their political strategies beyond their initial terms, incorporating a military component and exerting all necessary efforts to implement their main goals. They also influenced the election of their successors, ultimately leaving a powerful impact on their countries.

In the cases of Colombia and Venezuela, the notions of "Democratic Security" and "Bolivarianism" encompassed implicit and explicit principles and long-term goals. They also

influenced the behavior of incumbents as they implemented their plans, which became particularly noticeable during confrontations with opposition both domestically and internationally. By examining the narratives and actions of "Democratic Security" and "Bolivarianism" as political strategies, we can observe causal relationships and their enduring effects over time (Silove, 2018, 52-54). Taking into account these three elements as an analytical tool allows us to deepen our understanding of the multiple layers in which these strategies were employed and their impact on propagating militarism within these societies. Thus, this chapter aims to contribute to this field by examining the political strategies implemented by Chavez and Uribe and continued by their successors Maduro and Santos. The enduring nature of the strategies implemented by these incumbents that are still evident in their countries. Despite the occasional lack of explicitness, these strategies exhibited regularities that I intend to analyze here. Bolivarianism, referred to here as the Bolivarian Strategy, originated from Chavez's military experiences, particularly during his time as a cadet. This foundation was further reinforced by his involvement in a failed military coup. During his years of military training, he was exposed to social sciences and humanities, which had a profound influence on his thought (Ochoa & Rodriguez, 2008, 125). The Bolivarian Strategy draws upon ideas from Venezuela's founding fathers, including Simón Bolívar, Simón Rodríguez, and Ezequiel Zamora, relating to national independence, anti-United States rhetoric, Latin American integration, anti-oligarchic perspective, the fight against corruption, and education (Colmenares, 2011, 12). Chavez sought to revive the "Bolivarian dream" and erect Venezuela as a significant player on the world stage, imbuing his strategy with historical and messianic components (Susi, 2011, 32).

In Colombia, Democratic Security emerged as Uribe's strategy. This concept was introduced during his presidential campaign, capitalizing citizens' concerns about the instability caused

by military victories of the FARC (Angarita, 2012, 15-20). The goals of Democratic Security were succinctly articulated in the following speech: "Civilian rule should lead us to recognize that the restoration of civilian and public freedoms depends on reestablishing order, which is based on the legitimate exercise of authority. In Colombia, this means striving for security for all citizens" (Uribe, 2002, 53). Hence, this strategy aimed to re-establish state authority, which had been challenged by illegal armed groups, primarily the FARC.

However, these strategies encompassed more than mere discursive plans; they entailed specific actions to achieve their objectives. In Venezuela, these actions were framed under a program called *Una Revolución Democrática: Cinco polos para una nueva república* [A democratic revolution: five pillars for a new republic]. These pillars consisted of the following five aspects: 1. Macro-political restoration aimed to establish a participatory democracy through the enactment of a new constitution. 2. An inclusive justice program that sought to address issues of social inequality and ensure fair and equitable access to justice.<sup>4</sup> 3. Humanistic Economy;<sup>5</sup> 4. Political and administrative decentralization; 5. and, multipolarity in the international arena.

In Colombia, the main steps were included in the governmental program called *Hacia un Estado Comunitario* [Towards a Communitarian State]. Firstly, the program aimed to recover the state's presence across the territory. Secondly, it aimed to confront the illegal armed groups militarily. One quote summarizes this approach: "Without security, there is no prosperity; without peace, it is impossible to have a future" (Presidencia de la República, 2003, 19).

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<sup>4</sup> Dirección de Comunicaciones Presidencial (2012) *La revolución en la República Bolivariana de Venezuela, cronología 1998-2001*, tomo I, Caracas, Ministerio del Poder Popular para la Comunicación, 11-14.

<sup>5</sup> Guerra, José (2003) *La economía venezolana en 1999-2002: Política macroeconómica y resultados*, (Documentos de trabajo N. 46), Caracas, Banco Central de Venezuela.

### **3.4.1. Decisionism to Boost Political Strategies**

Mann considers that the foundations of political power are based upon a combination of infrastructural and despotic powers. Infrastructural power is understood as a set of actions taken by the state/government "to implement logistically political decisions" throughout civil society via consensus and institutionalized means. On the other hand, despotic power is understood as "a range of actions which the elite is empowered to undertake without routine, institutionalized negotiation with civil society groups" (Mann, 1984, 188-189).

Determining the boundaries between infrastructural and despotic power use has become a puzzle in specialized scholarship to determine if a country is a democratic or authoritarian regime. Mann discusses this, suggesting that a high level of infrastructural power and low level of despotic power result in a democratic regime. Conversely, high despotic power and low infrastructural power produce an authoritarian regime (Mann, 2019, 174-175).

Jessica Fortin-Rittberger has analyzed how both infrastructural and despotic powers are used in different proportions to hold and exert political power. She points out that coercion is almost the same in democratic and authoritarian regimes, contradicting Mann's view. The difference lies in the constraints put on its use, mainly through checks and balances. Furthermore, she argues that coercion, as a form of despotic power, goes beyond the robustness of the state/government's coercive apparatus. It includes a set of actions and correlations that allow, for instance, the executive branch to exert repression without social or institutional control to guarantee the survival of a government or regime (Fortin-Rittberger, 2014, 1259).

Both in Venezuela and Colombia, coercion was more than repression. This included a set of subtle mechanisms that took advantage of the democratic framework. One critical

mechanism for implementing these political strategies was decisionism. This is considered a political behavior in which the incumbent implements or carries out political decisions without the approval of the legislative branch. It is supported under states of exception or extraordinary situations, allowing the use of exceptional powers to make political decisions based on the judgment of the incumbents (Maliandi, 1986, 101-104).

Rebecca Tapscott referred to this contradiction as the "paradox of restraint" or "the coexistence of democratic institutions and authoritarian control," where democracy maintains institutional power restraining the executive's power and providing opportunities for contestation. However, it also interacts hand in hand with the use of the rule of law and arbitrary violence to maintain political power and project the incumbent's political influence across the national micro-level. Understanding this is critical to comprehending how militarism was spread across society (Tapscott, 2020). This is how incumbents exerted power to implement their strategies. Latin American literature suggests that decisionism allowed the encroachment of one incumbent or, in this case, his/her strategy in a specific scenario. Some examples include Saul Menem in Argentina and Alberto Fujimori in Peru.<sup>6</sup>

Both Chavez and Uribe frequently secured approval for their political initiatives in the legislative branch. In Venezuela, they often held the majority (Arenas, ND), while in Colombia, they resorted to clientelism and bribes to persuade certain members of this branch. However, during critical moments, both Chavez and Uribe utilized extraordinary decision-

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<sup>6</sup> See for the Argentinian case: Flax, J. (2004). *La democracia atrapada: Una crítica al decisionismo*. Buenos Aires: Editorial Biblos; Goretti, & Ferreira. (1995). *Gobernar la emergencia: Uso y abuso de los decretos de necesidad y urgencia*. *Ágora*, 3(75-94); Leiras, S. (Ed.). (2012). *Democracia y estado de excepción*, Argentina: 1983-2008. Buenos Aires: Prometeo. For the Peruvian case: García, M. (2001). *La década de Fujimori: Ascenso, mantenimiento y caída de un líder político*. *América Latina Hoy*, 28(49-86); Martínez, J. (2009). *Neoliberalismo y genocidio en el régimen fujimorista*. *Historia Actual Online*, Nro, 19, Primavera, pp. 65-75; Martín Sánchez, J. M. (2002). *Perú 28 de Julio: Discurso y acción política el día de fiestas patrias, 1969-1999*. Sevilla: CSIC.

making powers to implement their strategies or political initiatives without the approval of the legislative branch, albeit in different scopes and intensities in each country.

The use of despotic power within democratic regimes has become increasingly subtle in the 21<sup>st</sup> century, and decisionism is a key element in understanding how incumbents implement their political strategies and persuade others to follow them in a legal and constitutional manner. Carl Schmitt is the most crucial thinker in analyzing this phenomenon. He identified two forms of exerting political power: firstly, a normativist approach, which is impersonal and follows norms and rules; secondly, a decisionist approach, which is personalist and based on circumstances (Schmitt, 1996, 12). Mabee and Vucetic reinterpret Schmitt, suggesting that similarly, democracies can, under exceptional circumstances, utilize decisionism and, to some extent, militarism without breaking democratic principles, all based on the idea of sovereignty (2018, 100-101) and the popular support received by the presidents, as mentioned earlier.

In Colombia and Venezuela, a hybrid situation was present, wherein both constitutions included legal provisions that allowed incumbents to claim extraordinary powers, leading to a progressive erosion of democracy. This situation is characterized by a normative figure that, while not technically breaking the legal framework, undermines democracy as it excessively relies on decisions made by incumbents.

In Venezuela, the *Ley Habilitante* (Enabling Law) was incorporated into the 1999 Constitution. This granted the incumbent the ability to request special permission from the National Assembly to make decisions in various fields by enacting laws and decrees without requiring approval from the legislative branch. Chávez invoked this extraordinary power on

four occasions during his time in power: in 1999, 2001-2002, 2007-2008, and 2010-2012.<sup>7</sup> Highly criticized due to its anti-democratic nature, this provided leeway to Chavez to enact controversial laws, even those that were unpopular (Arenas, 2009). One of the most controversial enabling laws was enacted in 2007 by the National Assembly, which granted extraordinary powers to Chavez during his third term. This was critical to accumulate political power and imposing the infamous "Socialism of the 21st Century", as the ultimate stage of his political strategy. This had previously been rejected in a referendum by citizens. Typically, many of the incumbent's decisions were publicly announced through *Gacetazo*, referring to laws that were enacted and published unexpectedly in the country's official gazette (Otalvora, 2008, 18). Thus, many of the main goals of the political strategy were established, including the aggrandized role of military power in fulfilling diverse duties. Similarly, in Colombia, Uribe used the "state of internal commotion," a legal figure included in Article 213 of the 1991 Political Constitution. According to this, in the case of public disturbance or emergency, the incumbent would request authority from Congress to issue transitory laws, some of which might ignore fundamental civil rights, and/or to issue decrees aimed at pursuing specific goals (Peña, 2004). Uribe efficiently used this constitutional power. For instance, he successfully created a new war tax for wealthy people in 2002, divided the country into special regions to fight against illegal groups, and modified "articles 15, 28, and 20 of the 1991 Constitution, regarding the right to privacy, freedom of conscience and beliefs, and expression and communication, respectively" (Uran, 2008, 118). However, the significant difference with Venezuela is that the Colombian Constitutional Court declared these modifications unconstitutional (Revenga & Girón, 2005).

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<sup>7</sup> Leyes habilitantes [Enabling Laws], Available at [http://www.pgr.gob.ve/index.php?option=com\\_content&view=article&id=2911](http://www.pgr.gob.ve/index.php?option=com_content&view=article&id=2911) (Retrieved 13 June, 2021).

According to Schmitt, "the source of the 'rule of law,' [...], of each norm and order derived from itself, does not stem from the power granted to the incumbent; on the contrary, it stems directly from the authority or sovereignty of the incumbents to decide the legitimacy of the power used" (Schmitt, 1996, 27). This is how Chavez and Uribe operated during their presidencies.

In Venezuela and Colombia, extraordinary powers were used to boost incumbents' political strategies, although this became a more recurrent practice in Venezuela. In both cases, they took advantage of institutional mechanisms that added to electoral support and popularity providing them with an unusual political capital. This situation generated tension regarding the regular democratic procedures, articulating a despotic feature within the limits of infrastructural procedures. This allowed them to issue several political decisions that, in a standard democratic scenario, would never have happened. These decisions, characterized by a personalist trait, questioned the existing institutional rules and procedures, including democratic deliberation with the political opposition. Chavez and Uribe used equivalent constitutional mechanisms to pursue their political strategy goals. In this regard, it is important to highlight the perils of these actions for a democratic regime, particularly in undermining the basic principle of deliberation among different political forces.

Despite that, incumbents claimed to act for the supreme common good. Thus, the decision itself created the rule of law, with a hybrid component between infrastructural and despotic power that shows how, in these empirical cases, democracies may have a legal and legitimate authoritarian component that grants incumbents extraordinary powers that technically do not transgress institutional limits but, in the long term, deteriorate democracy and open the door for authoritarianism. In Schmitt's words, "Only decision establishes both norm and order" (Schmitt, 1996, 30). This is not only due to the main components of presidentialism and the

particularities of each constitution but also because of the popular support incumbents received. However, in the Colombian case, the Constitutional Court was able to stop Uribe's decisional aspirations on several occasions. This is a critical point that partially addresses the initial question of this chapter regarding why Colombia, despite having a decisionist component, did not transition to an authoritarian regime as happened in Venezuela.

### **3.5 Political Strategies and Military Power: Democratic Security and Bolivarian Strategy**

#### **3.5.1. Kind of Militarist Leadership**

To understand the factors that contribute to the inclusion of military power in the political strategies of Uribe and Chavez, it is essential to analyze the context and characteristics of these presidents. In this regard, I will refer to Carreras' model of political outsiders as a typology, but in this case, I will apply it to these two incumbents and their relationship with militarism. Ideal types have been criticized for being reductionist, but they still serve a useful purpose in describing certain social phenomena (Psathas, 2005). As I discussed earlier, both presidents came to power as outsiders. Following Carreras' categorization, Chavez can be seen as a “full outsider”, someone without a political background. On the other hand, Uribe can be categorized as a “maverick”, someone with ties to political parties but who decided to run for presidency independently (Carreras, 2012).

Similarly, the context of each country provides an understanding of why militarist traits were incorporated into the political strategies of these presidents. In Colombia, the atmosphere of internal armed conflict at the turn of the millennium and the fear of a high risk of state collapse contributed to the election of Uribe, who offered an iron-handed perspective in dealing with the challenges arising from this context. In this scenario, the concept of a "strong president" can be suggested. It can also be applied, to some extent, in scenarios where there

is no armed conflict but where criminality and internal insecurity drive the election of a strongman who adopts militarist actions in the domestic realm. The strong incumbent has no military or security institutions background and can be seen as a civilian leader advocating for order and state authority. Uribe serves as the "ideal type," and another example could be Nayib Bukele in El Salvador.

In contrast, although Venezuela did not face a domestic military threat, militarism emerged primarily from the idea of the army as a source of order and salvation for the country, as protectors of *la Patria* [fatherland] during moments of political and economic crisis. In this context, Chavez, with a military background, can be categorized as a “martial president”. This concept can also be applied to leaders with a background in security institutions. Examples of this, include Lucio Gutierrez in Ecuador, or Jair Bolsonaro in Brazil. In Colombia and Venezuela, civilian militarism implies that these leaders were democratically elected, despite they exhibited certain militarist characteristics (See Table 3.1).

Economic, social, political or security problems	Martial President	Civilian Militarism
	Strong President	

Table 3.1. Civilian Militarism and kinds of militarist leadership.

**3.5.2 Political Strategies and Military Power**

Military power became a fundamental actor/institution in promoting militarism in both Colombia and Venezuela as part of the political strategies of Chavez and Uribe. These political leaders granted extraordinary power to the armed forces while ensuring their subordination. According to Mann, military power, especially in its institutional form, is a social organization that controls lethal violence and employs extreme measures when necessary, including repression. While this power has its autonomy, it is often subordinate to political power (Mann, 2013, 2; Mann, 2019, 179). Although militarism encompasses more

than just military involvement, the inclusion of military power in the domestic realm is crucial for this phenomenon. In this regard, both leaders incorporated military power into their political strategies.

During his presidential campaign, Uribe emphasized his intention to "elevate the military and police professions, fostering society's appreciation and respect for them. This, in turn, will motivate them to strive for the respect and admiration they deserve" (Uribe, 2002, 12). Uribe won the presidential election in 2002, employing a hard-line discourse that advocated for the use of state coercion apparatus.

For Uribe, military power was the legitimate instrument of the state to re-establish governmental presence throughout the country, particularly in regions influenced by defiant armed groups (Presidencia de la Republica, 2003, 21). Plinio Apuleyo, a respected conservative intellectual, considered Uribe to be the only Colombian politician capable of commanding and controlling military power to achieve supreme political objectives. In support of Uribe's candidacy, Apuleyo stated, "He will be the true commander-in-chief of the Armed Forces [...] He will not allow a remote village to face a left-wing guerrilla siege on its own " (2002, 32).

The Bolivarian Strategy incorporated many ideas from the Venezuelan founding fathers. Some ideas, particularly appealing to Chavez and his followers, were those of Simon Bolivar, the liberator of Venezuela, who emphasized the necessary interaction between political power, the population, and military power (Lopez, 2009, 11). Chavez instrumentalized these ideas, incorporating them into his own perspective on the role that the military should play as an institution within national development. He was also influenced by reading *El ejercito como agente de cambio social* [The Army as an Agent of Social Change] by Claude Heller (Harnecker, 2002, 9). In one of Chavez's televised national talk shows, "*Alo Presidente*"

[Hello, mister president] in 2009, he referred to the founding father saying, "Bolivar, Father! We are here, your sons, your soldiers. We have taken your flag and sword. Soldiers for the people, soldiers chosen by the people, [...] soldiers for the truth and democracy."<sup>8</sup>

Thanks to the extensive political power granted to Chavez by the Constitution of 1999, he implemented a process of political, economic, and social restructuring, which involved a significant role for the Venezuelan military. The Bolivar Plan 2000 was the primary guiding framework for the military's involvement in non-military roles and missions. According to Chavez, the primary goals of this civil-military plan were to rebuild the people's trust and faith in the military, which had been damaged by the military's actions against the population that had protested during the establishment of neoliberal reforms. He stated, "Ten years ago, we [the military] went to repress those people. Now we go to show them love. We go to cover the territory, to alleviate misery. The enemy is death. We will give them life instead of fatal shots" (Harnecker, 2002, 43).

Military power was deeply entrenched in both political strategies. Rather than solely imposing authority from the executive power, they utilized a legal framework to legitimize any kind of action within this realm. However, the approaches in each case differed. While Chavez operated under a well-defined legal framework that allowed for the military's involvement in non-military roles through decisionism, Uribe did not have a similar arrangement. Instead, he relied on existing laws, also dealing with the democratic checks and balances that limited his actions in this realm.

Thus, Chavez successfully established a new constitution in 1999, providing him with ample legal room to implement his political strategy. Meanwhile, Uribe navigated within the

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<sup>8</sup> Chavez, Hugo (2009), *Aló Presidente Teórico* N° 5, broadcasted from Fuerte Tiuna, Caracas, available at <http://todochavez.gob.ve/todochavez/6290-alo-presidente-teorico-n-5>.

framework of the 1991 Constitution in Colombia, without seeking to reform or subordinate this to his political strategy. The new Venezuelan Constitution included a set of norms that progressively allowed the involvement of military power in domestic affairs, extending beyond military duties and encompassing activities related to national development. In contrast, Uribe operated within the pre-existing constitutional framework that assigned the military power the role of a state's coercive tool without explicit duties. Numerous missions emerged in Colombia as part of the military's response on the ground.

Chavez succeeded in having the National Assembly pass a series of laws on security issues, military organization, and civil-military relations. These laws aimed to create a well-defined legal framework that protected his actions while ensuring military involvement in his political strategy. He managed to enact *Ley Organicas de Seguridad Nacional* [Organic Law of National Security] in 2002, 2005, and 2008, which provided legal grounds for the military power's participation in non-military duties that will be further explained in the next chapter. On the contrary, in Colombia, Uribe's strategy had a roadmap for the military power known as the Democratic Defense and Security Policy (*Política de Defensa y Seguridad Democrática* or PDSD), which was unveiled in June 2003. This strategy recognized that recurring waves of violence in Colombia were a result of the state's weakness. To establish authority, it was deemed necessary to strengthen and deploy military power throughout the country, particularly in regions under the control of defiant armed groups such as guerrillas and drug cartels. The plan aimed to subsequently deploy other state institutions such as the judiciary branch and health and educational services. The PDSD also emphasized the urgency of protecting the population to ensure their democratic rights, freedom, liberties, and unrestricted movement, particularly in remote regions, in tandem with capitalism. To achieve the objectives outlined in this policy, the National Defense and Security Council, along with

the Joint Intelligence Board, was instituted, encompassing regional and local branches (Ministerio de Defensa, 2003).

Despite an effort to formalize this policy into national law through the proposed "National Defense and Security Law," which was submitted to Congress in 2003, it faced rejection from the opposition. The rejection stemmed from controversial provisions, including the grant of extraordinary powers to the military. These powers involved authorization to arrest and detain individuals without warrants, conducting intelligence activities without legal authorization, and acting as the Judiciary Police on the battlefield, collecting evidence in case of the death of an enemy combatant.

Despite the Democratic Security strategy never becoming a formal law, its principles were considered by both civilian and military authorities as a milestone for this government.

According to Uribe:

Our reform [of the Colombian Armed Forces] has aligned very well with the Democratic Security Policy, which has strengthened the Armed Forces and provided the essential element that was always lacking: political determination at the strategic level (Uribe, 2005, 8).

When comparing both cases, it is possible to say that Chavez, overseeing the political power, implemented a set of well-detailed laws and norms framed under the Bolivarian strategy concerning civil-military relations. These included the definition of duties for the military power and the role of political power over them. This facilitated a structural change that could endure even if Chavez were no longer in power. In contrast, the Democratic Security strategy, in the case of Uribe, was directly associated with him and his interactions with the Colombian military. However, this interaction never materialized into a formal law due to opposition from other political branches, limiting the extent to which a subsequent government would be bound by this framework in its purest form. Although Uribe's policy as a strategy became

a source of political capital and an ideological reference for his followers, as well as a subject of criticism from the opposition, it never reached the high level of influence that the laws and norms promoted by Chavez reached in Venezuela. These laws and norms aimed to involve the military and merge political and military powers under the leadership of the incumbent.

#### **3.5.2.1. Enduring Political Strategies: The Enemy**

Due to the militarist component incorporated into these strategies, they ignited political confrontation with both domestic and international opposition. The opposition contested through criticism, resistance, and denunciations, demanding respect for democratic norms, rules, and civil liberties. In response, the incumbents deployed actions that can be categorized within a Schmittian framework of friend/foe, creating an irreconcilable antagonism that in some respect was useful to consolidate these political strategies (Schmitt, 2007 [1932]).

Between 2002 and 2010, as Chavez's political strategy became more radical, the incumbent tended to create an enemy that represented an antagonistic rivalry. Political opponents, mass media, and non-governmental organizations that opposed the government became the domestic enemy of the Bolivarian strategy (International Crisis Group, 2007). Various practices unfolded in this scenario, including governmental activities aimed at discrediting the opposition and non-lethal actions to prosecute them, both in the public arena and with the support of the judicial branch. Chavez frequently used the derogatory term *escualidos* [pale snobby] in his speeches to broadly refer to the political opposition, intending to delegitimize their political action (Romero & Romer, 2016). These actions included the cancellation of licenses for opposition newspapers, television channels, and radio stations as a form of mass media censorship aimed at gaining control of information by eliminating alternative sources (Lopez, 2011).

Furthermore, Chavez constructed a set of external enemies. Initially, the United States was seen as the main imperialist force that threatened the interests of the Bolivarian strategy. Later, Colombia, a country perceived as the antithesis of Bolivarianism and ruled by traditional elites orchestrating against Chavez's government, became a target. In this logic, Colombia was perceived as a close ally of the United States. In this respect, Chavez aimed to present to public opinion that Bolivarianism was under threat from multiple internal and external. Consequently, he called for the reinforcement of this strategy to protect the country and its interests. The following paragraph summarizes this point.

Remember fellow citizens: this battle is going to be very tough, because we are not fighting against the Venezuelan political opposition's tactics, we are either fighting against the mass media; not, we are confronting the North American empire (Chavez, 2006, 43).

In Colombia, Uribe rose to political power with a bellicose discourse against the FARC, considering them the main enemy that needed to be fought not only in the military arena but also in the political sphere. The goal was to eliminate factors that destabilized institutions, democracy, and economic development. As a result, he closed off any possibility of dialogue with this guerrilla. From the incumbent's standpoint, they were viewed exclusively as a "terrorist threat," devoid of political legitimacy, and deemed necessary to be neutralized swiftly for the common good (Revista Semana, 2005, Nro. 1188, 25-28).

In this context, Uribe believed that anyone who disagreed with the Democratic Security strategy or expressed opposition to his government indirectly was collaborating with this guerrilla. Consequently, the political opposition that criticized Uribe's policies and his actions, including non-governmental organizations, independent media, and human rights defenders, were labeled as "useful idiots" because, in his view, they served the interests of guerrillas and posed a threat to the country (Revista Cambio, 2004, Nro. 578, 21).

Throughout his political discourse, Uribe systematically delegitimized the actions of the opposition, promoting hatred and blocking or silencing dissenting voices. This was often reinforced by illegal forces such as death squads and paramilitary groups associated with the incumbent's strategy. Another tactic of political warfare that unfolded during his term was known as *chuzadas*, which involved the illegal interception of key political actors or activists who disagreed with the government (Hervieu & Posada, 2010, 3-4).

Uribe's actions generated an atmosphere of fear and legal insecurity, reaching its peak with the revelations of the assassinations of young people falsely presented as FARC's combatants by the military, known as *falsos positivos* (Rodriguez & Cepeda, 2021).

In general terms, the maneuvers employed by Chavez and Uribe to create an enemy within a friend/foe relationship align with Schmitt's postulates. Schmitt pointed out that incumbents have the power to "declare someone an enemy within the State" and take all necessary actions to diminish their political influence or eliminate them from the domestic political landscape, even resorting to illegal and unconstitutional measures (Schmitt, 2007 [1932], 56-57).

In Colombia, Uribe's government employed illegal actions against the opposition, including intimidation, threats, and covert pressure by state intelligence services and illegal groups. They also gathered information through illegal espionage and carried out arbitrary detentions of journalists, political and social leaders, academics, and trade unionists. Meanwhile, in Venezuela, Chavez's government took actions that curiously utilized institutionalized instruments, such as canceling mass media licenses, imposing economic sanctions on opposition-led companies for alleged mismanagement, or initiating legal proceedings against political or student leaders (Ayala, 2010).

The incumbents' call to confront internal or external enemies in both countries garnered numerous followers who served as a political base, providing electoral support and

legitimizing their political strategies. Thus, despotic forms of exerting power emerged and unfolded within democratic regimes in both countries, aiming to gradually suppress dissent and political opposition, employing increasingly extreme tactics. However, these tactics had more detrimental effects on the democratic regime in Venezuela compared to Colombia, even though intimidation and violence were more pronounced in the Colombian case.

### **3.6. Prolonging Political Strategies**

Chavez and Uribe employed two practices to prolong their political strategies: seeking re-election and transferring political power to a trusted ally, thus ensuring the continuation to fulfill their main political goals.

#### **3.6.1 Re-election**

Re-election, which had been banned in both countries for decades to prevent power concentration, gradually gained appeal among different political forces and citizens, primarily influenced by the popularity of the incumbents' political strategies led by Chavez and Uribe (Treminio, 2013, 7). This trend aligned with a wave of re-election that swept Latin America at the beginning of the new millennium, fueled by the high level of personalism in politics and as a form of reward for those perceived to have performed well during their terms (Payne & Cruz, 2006, 77-79).

Chavez, thanks to his extraordinary power and decision-making, managed to secure re-election on multiple occasions between 2001 and 2013 when he passed away. Without obtaining approval for re-election through the National Assembly and various referendums, this incumbent would not have been able to execute his political strategy. However, this had a significant impact on democratic competitiveness, as described in an article in the Magazine Zeta:

Thus, the eventual establishment in Venezuela of an unlimited presidency will necessarily imply in the short term, repression in order to remain in power; in the medium term, a communist economic order to justify its existence; and in the long term, the designation of an heir to the throne in the person of one son or brother, as it happened in the royal dynasties during old regime (Rosales, 2007, 12).

In Colombia, the approval of presidential re-election resulted from cooperation among various political sectors with representation within the Congress. They believed that Uribe was the only politician capable of defeating the FARC, thus deeming an additional term necessary to achieve this goal. Although re-election was initially approved for 2006, when Uribe sought re-election again in 2010, the decision was overturned by the Colombian Constitutional Court due to legal and substantive shortcomings (Burad, 2010, 19-25).

This political maneuver aimed to ensure the continuation of the strategies of these presidents by altering the rules of the presidential election. Chavez and Uribe remained in power for more than one term, which had a detrimental impact on these fragile democratic regimes, despite claiming altruistic reasons. This had several consequences: Firstly, it resulted in an aggrandizement of executive power. Secondly, it fostered clientelist activities between the executive branch, legislative branch, and political parties to secure support for the executive's initiatives. Thirdly, it created an unfair electoral environment for any candidate competing against the incumbent. Fourthly, it allowed for the deepening of militarism through various measures. In an interview, Chavez himself highlighted this situation:

I consider -and I am not the only one, I think we are millions of us- that it is necessary to assure the survival, the continuity of a central strategic line [...] I have no turning back. I am in the position to guarantee the continuity of the Bolivarian program [...] I believe that I must be in charge of this process for a couple of years more and beyond the year 2012 [...] (Rangel, 2012, 267-268).

In Colombia, a source highlighted that due to the significant achievements of the Democratic Security measures against violent groups, Uribe was perceived as the only president in Latin

America whom the people did not want to remove, but instead desired his re-election (Santos, 2003, 24-25).

While re-election operated similarly in both countries, Colombia's system of checks and balances played a crucial role in containing Uribe's second re-election.

### **3.6.2 Political Strategies as a Political Capital: Maduro and Santos Terms**

Chavez and Uribe were successful in addressing the main challenges for which they were democratically elected, using their political strategies as their flagship (Pachon, 2009; Ellner, 2010); however, unforeseen circumstances hindered their attempts to continue in the presidency. In Venezuela, Chavez's unexpected death, caused by cancer-related problems, left the Bolivarian strategy without its main leader (Educere, 2013). In Colombia, Uribe's attempt to seek a second re-election was blocked by the Colombian Constitutional Court, as mentioned earlier.

Both political strategies served as sources of ideological power, fostering a strong sense of identity among their followers and allies, as the incumbents led it in a messianic manner, providing hope and alleviating fears. This approach proved useful in persuading the population to support their electoral campaigns, enabling the continuation of these strategies. Recent achievements, extreme antagonism, and promises to fulfill ultimate goals were instrumental in securing electoral support. This combination served as a political capital to ensure the election of preferred successors. According to Pierre Bourdieu, citizens' actions are influenced by political leaders who limit or censor options within the political game, presenting their own interests as the interests of those they represent (Bourdieu, 1981, 171-175).

In Venezuela, Nicolas Maduro, who had previously served as the Minister of Foreign Relations, was selected by Chavez to be his vice-president during his fourth term, which

began in 2012. Among the four potential political figures considered by Chavez to replace him in case of need, Maduro was the only one without a military background. Likewise, under Chavez's mentorship, Maduro gained significant political prominence (Arenas, 2016). In Colombia, Juan Manuel Santos was chosen as Uribe's political successor. He had risen to prominence during Uribe's second term, primarily due to his successful tenure as Minister of Defense, where he led notable military actions against the FARC (Wills-Otero & Benito, 2012). However, unlike Maduro, Santos had his own political standing and came from a traditional political elite background.

The inherited political capital provided Maduro and Santos with sufficient legitimacy to continue with both political strategies, garnering support in elections. However, discontent against Maduro grew over time. Factors contributing to this discontent included government mismanagement, a decline in oil revenues, hyperinflation, high crime rates, repressive measures against political opposition, and foreign sanctions (Romero & Benayas, 2018). Despite numerous challenges, Maduro managed to hold onto power by leveraging political capital, electoral support, and progressively adopting authoritarian measures such as the imprisonment of opposition leader Henrique Capriles and engaging in intense confrontations with the opposition-controlled National Assembly, which brought Venezuela to the brink of a civil conflict (Vinogradoff, 2015).

In Colombia, Santos inherited the political capital from Uribe as the natural leader of the Democratic Security strategy, assuming the role of political heir and custodian of the military initiative against the FARC (Pachon & Hoskin, 2011). However, the new president used the received political capital unexpectedly. He intensified military operations against the FARC, but also initiated a peace dialogue with this guerrilla group. These actions deteriorated the relationship with his former political allies, primarily Uribe. Nevertheless, Santos managed

to instrumentalize political capital by promoting the idea that peace was a more advantageous action for both democracy and capitalism (Tappe, 2021). Peace negotiations with the FARC began in Havana, Cuba, in 2012 (Santos, 2021), creating a tense scenario between Santos' pro-peace followers and Uribe's militarist followers. Finally, a peace agreement with the FARC was signed in 2016.

Although both Maduro and Santos received political capital through political strategies from their mentors, Santos was able to deviate from his godfather's path by adopting a pragmatically Democratic Security strategy. In contrast, Maduro deepened the Bolivarian strategy, intensifying its authoritarian character using all the legal apparatus implemented during Chavez's successive tenures.

### **3.7. Conclusion**

Chávez and Uribe were two incumbents who pursued long-term strategies to achieve their political goals, responding to local challenges while simultaneously using these to retain political power and promote their worldview on how to deal with multiple issues. The implementation of these strategies was facilitated by existing presidential systems and certain institutions and traditions that provided them with the freedom to prolong these efforts, including seeking re-election and empowering their political successors to continue in the pursuit of the goals outlined by these strategies. One notable difference between the two cases is that while the Bolivarian strategy in Venezuela had a re-foundational character, aiming to transform almost all political, social, economic, and even military structures through initiatives like "socialism of the 21st century"; the Democratic Security strategy in Colombia primarily focused on addressing security threats to the state by increasing its coercive capacity and utilizing other measures to mitigate the political and social impact of insurgency, even including illegal methods.

Chavez and Uribe employed various practices to achieve the goals of their strategies, such as decisionism, which was supported by local legal institutions and enabled them to incorporate military power into their strategies in a well-coordinated manner. However, this approach was more successful in Venezuela than in Colombia, as Chavez and his allies were able to enact laws that ensured the continuity of their political strategy and the military's role. In Colombia, democratic checks and balances, such as opposition in the Congress and the Colombian Constitutional Court, were able to hinder Uribe's hegemonic aspirations, and even his successor's political autonomy led to a shift in the direction of the Democratic Security strategy achieving a peace agreement with the FARC.

While militarism is not the sole determinant to detect a regime transitioning to authoritarianism, it is an important factor that reveals how, when incumbents incorporate the military into non-military functions, they deteriorate democratic quality, opening the room for excessive accumulation of power and increasing the chances of authoritarianism. In this regard, both Chavez and Uribe integrated military power into their political strategies, influenced by circumstances, particularly the historical role of the military in each country and the challenges during times of crisis. In this respect, I have proposed the categories of 'martial president' for Chavez and 'strong president' for Uribe, which could be valuable in scholarly literature to comprehend civilian militarism in the relationship between political power, strategies, and the management of military power.

Lastly, addressing the main question of this chapter, despite the popularity of both political strategies and incumbents, the radical nature of the Bolivarian Strategy managed to endure over time, thanks to the consolidation of power, the establishment of a political party aligned with this strategy, and the limited role of democratic checks and balances in Venezuela to confront the excessive accumulation of power exhibited by Chavez and later by Maduro. In

Colombia, the Democratic Security strategy gained immense popularity. However, the opposition, congress, and constitutional court, along with the performance of Uribe's successor, particularly Santos, effectively downsized its impact in the Colombian context, addressing the authoritarian trait.

## **CHAPTER 4**

### **MILITARY POWER: BETWEEN INFRASTRUCTURAL AND DESPOTIC POWER**

#### **4.1 Introduction**

Military power is critical for state consolidation because this guarantees both domestic security and international survival through coercion. This source of power became central to the proliferation of militarism within Bolivarian and Democratic Security strategies, serving as an ideal societal role model and a source of infrastructural and despotic power, as I will discuss in this chapter.

Chavez and Uribe granted significant power to the armed forces while simultaneously maintaining their subordination and aligning them with their political goals. This ultimately proved detrimental to democracy, particularly in Venezuela. Despite the similarities between both cases, there are profound differences, particularly regarding the missions and roles that military power played in each political strategy, leading to different consequences in terms of civilian militarism in Colombia and Venezuela.

The literature on military power across Latin America has waned since the era of dictatorships and civil wars during the Cold War. In recent years, existing research on this topic has primarily focused on two areas. Firstly, militarism has been examined from various perspectives, particularly concerning the militarization of public security (Robledo, 2022; Solar, 2021; Flores-Macías & Zarkin, 2021; Martinez & Bueno, 2023; Diamint, 2015). Secondly, other literature has focused on the role of military power in addressing domestic issues (Kruijt & Koonings, 2022; Álvarez & Gómez, 2022; Pion-Berlin, 2019). However, the internal dynamics of military power and their interaction with political strategies led by incumbents have received less attention. For many years, the military in the region were responsible for propagating militarist and authoritarian ideas, even committing atrocities in

the name of order and stability. Rut Diamint suggested the concept of "old militarism" to describe this phenomenon (2015), which is exemplified by the active political involvement of military power over the years in Latin America (Loveman, 1999; Rouquié, 1987).

However, in both Colombia and Venezuela, the military had an ambiguous role without direct involvement in political power since the 1950s. In both countries, there was a different form of involvement during the Cold War in the domestic realm, which was more subtle and less intrusive regarding political power. This involvement took the form of praetorianism in Venezuela and state of emergency in Colombia, as I explained in the first chapter. Both countries, as fragile democratic regimes, witnessed the emergence of civilian militarism that promoted war, military glorification, and war preparations as valuable responses to a multifactorial crisis. This crisis was primarily driven by the deterioration of state capacity brought about by neoliberalism. This included the spread of militaristic actions, practices, and attitudes into political and social realms to fulfill the goals of political strategies. This phenomenon is unique in the context of long-lasting stable democratic regimes. It offers valuable insights into the 21<sup>st</sup> century, where several elected leaders have emphasized the trend to use military power. They promote its values and skills to address various challenges while encouraging their martial behavior and structures as powerful assets for political power. In this regard, this chapter aims to address the following question: Why did the military become omnipresent in the political and social realms in Venezuela, while in Colombia, this did not occur, despite military power being a crucial component of the Bolivarian and Democratic Security strategies? To answer this question, this chapter will be divided into five parts. Firstly, I will explain the main elements that help us understand why military power was used by the incumbents as a source of despotic and infrastructural power considering domestic traditions. Secondly, I will explore how Chavez and Uribe integrated military power

into their political strategies, considering roles, missions, and the rapport they cultivated with the military. Thirdly, I will analyze how incumbents, through civilian militarism, garnered the support of military power, including the dynamics of politicization versus professionalization. Fourthly, I will examine the legacy of military power in the governments of Maduro and Santos. Finally, some concluding ideas will be provided.

#### **4.2 Military Power as a Source of Infrastructural Power and Despotic Power**

Military power is understood as the social organization that controls lethal violence and exerts coercion, and it is usually under the subordination of the state. According to Mann (2013, 2), political power often overlaps with military power, but the latter tends to possess distinctiveness inside society, driven by its inner dynamics and values. While military power maintains autonomy within the state and stands as a source of power in its own right, grounded in its control of organized violence and coercion, its influence as a group on society is limited. The military has limited opportunities to mobilize public opinion (Lawson, 2006, 4), disseminate their beliefs throughout society, or seek economic resources without an active role of political power within the context of democratic regimes.

The military stands as the original proponents of militarism, intending to place their values above those of civilian and political spheres (Vagts, 1959). They are driven to preserve their group interests and at times may exaggerate existing threats, as recently has been suggested in a well-elaborated research by Laura Samotin (2022). However, in Colombia and Venezuela, militarism was spearheaded at the turn of the millennium by civilians who held specific goals and beliefs regarding war, glorification of military values, and preparedness for war to advance their political objectives. These civilians sought to incorporate not only military power into their political strategies, but also their ethos as something worthy of emulation by society. While civilians in power retained their preferences over those of

military power, they utilized military power instrumentally due to its ability to act in an organized manner in various situations, follow orders without opposition, and possess the means to fulfill different missions.

In Latin America, including Colombia and Venezuela, three distinct traditions related to military power are relevant for understanding the circumstances under which incumbents such as Chavez and Uribe could involve military power in their political strategies. Firstly, military power is perceived as the guardian of *La Patria* (fatherland), responsible for safeguarding it from threats and challenges that endanger the state's survival (Loveman, 1999). Secondly, military power possesses a strong sense of belonging and autonomy within the state structure to address various military and security issues (Varas, 1988). Thirdly, despite the ideals of separating domestic and international roles introduced by military professionalization, historical involvement in internal matters, especially domestic security missions, has been a common practice across the region (Torres, 2000). In this respect, sustained opposition to such involvement has been limited, primarily due to its routinization in many countries, with exceptions found in some countries in the Southern Cone.

In both Colombia and Venezuela, military power, despite democratic traditions, has been an important protagonist since the Cold War era in these countries. With some occasional disapproval, the military has enjoyed high prestige within these societies. The level of prestige accorded to the military plays a crucial role in shaping the population's approval or disapproval of their involvement in domestic affairs. Erickson, Kljajić, and Shelef suggest that societal trust in military power is a critical factor that allows political authorities to deploy them in domestic missions (2023).

In Venezuela, due to the military's early return to classical military roles in the late 1960s, they gained a high level of trust among the population. However, their involvement in

suppressing protests during the late 1980s, amidst neoliberal reforms, led to a decline in confidence. Nevertheless, this trust was gradually restored in the 1990s when the population once again perceived the military as a reliable institution (Ochoa & Rodriguez, 2003, 129-131). Similarly, in Colombia, the military has enjoyed substantial credibility among the population, primarily because of their role in confronting various domestic threats, despite instances of abuse and human rights violations, often occurring in remote regions (Torres, 2008). Therefore, it is reasonable to speculate, based on Solar (2022), that even though the military in Colombia and Venezuela had been involved in excesses, they were seen as the saviors of their countries during challenging times. At the same time, the military was not considered a threat to the democratic regime due to its historical subordination to elected authorities, unlike what occurred in other countries across the region.

Likewise, the military and some politicians supported the involvement of the military in domestic issues and non-military activities a long time ago. This falls into the category known as "developmentalist military." This perspective shares many ideas with leaders such as Nasser or Suharto about the active role the military should have in modernizing their countries and reducing domestic problems. In Colombia, this trend became popular among Korean War veterans (Ruiz, 1965), and in Venezuela, it was thanks to the reform of military education in the seventies, known as Plan Andres Bello (Åsedotter, 2016). This perspective aligns perfectly with Charles Moskos' analysis, who mentioned the "increasing interpenetrability of civilian and military spheres, both structurally and culturally," after the fall of the communist bloc, including new missions and roles for the military to utilize their capabilities (1998, 2). Thus, at the turn of the new millennium, this approach to military involvement in domestic issues was justified.

Mann talks about the combination of infrastructural and despotic power to achieve state aims, as mentioned earlier. Despotic power includes the use of various actions by the ruler to impose their goals without negotiation with civil society, including coercion. On the other hand, infrastructural power allows the state to penetrate society by implementing political decisions and actions, including providing public goods and infrastructure (Mann, 1984). Within the literature, there have been various interpretations of Mann's infrastructural and despotic powers (see Prasad, 2016; Fortin-Rittberger, 2014).

In this dissertation, I intend to demonstrate that, within the context of civilian militarism, political strategies in Colombia and Venezuela utilized military power as a source of both despotic and infrastructural power in varying forms and proportions to fulfill the political goals of incumbents. This was possible due to the subtle involvement of the military power in the domestic realm in both countries across the years. At the same time, civil society agreed to support these incumbents and their political strategies due to the absence of a tradition of military involvement in political power and the desire to actively utilize them in domestic issues. This aligns with the explanation suggested by McCleary and Williams: "As long as a society predominantly reflects values associated with a militaristic worldview, that society is likely to have leaders who emphasize military solutions" (2009). In this regard, as demonstrated in the previous chapter, civilian elected leaders had the possibility to use the military based on their popularity and circumstances, almost without restrictions, using legal tools. Military power, as an autonomous source of power possesses both coercive capabilities and the organizational structure to fulfill various roles and missions.

The central argument of this dissertation revolves around the idea that the erosion of state capacity due to neoliberalism created space for radical political strategies that incorporated civilian militarism. In this regard, drawing from Joana and Mérand's work, it can be asserted

that the deterioration of state capacity leads to the need for the remilitarization of the state, favoring the emergence of civilian militarism that facilitates the incorporation of military power into political strategies to achieve this aim. According to these authors, the militarization of the state occurs when the state lacks sufficient power, but once this takes place, there is a gradual process of demilitarization within the state, including a reinstalment of civil bureaucracy and a shift towards privatization (2014). Therefore, civilian militarism, as presented in Bolivarian and Democratic Security strategies, aimed to reassert the militarization of the state by utilizing military power as a source of despotic and infrastructural power in conjunction with other actions, practices, and tactics. Importantly, this militarization is not the consequence of foreign wars or external threats; instead, it is primarily linked to the domestic context and the imperative for swift action, with the extreme case of Venezuela, serving as the focal point of analysis in the subsequent section.

#### **4.3. Military Power on the Ground**

Bolivarian and Democratic Security strategies integrated military power as their cornerstone. This enables us to explore the concept of civilian militarism, as these strategies were spearheaded by elected civilian leaders who relied on militaristic rhetoric and practices. Military power assumed a prominent role within both countries, influencing both the populace and the state apparatus. Simultaneously, it served both as despotic and infrastructural powers. As Siniša Malešević, drawing from Mann's ideas, suggests, "military power has proven pivotal in accounting for significant social transformations, playing a crucial role in initiating long-term social change" (2016, 120). However, this transformation was not solely the result of military initiatives; it required the leadership of civilian authorities within a civilian militarist aura.

Hence, Chavez and Uribe, in their efforts to enhance state capacity, embarked on a process of reasserting the militarization of the state within their respective strategies. Nonetheless, the situation evolved differently over time. In Venezuela, this initially leaned towards fulfilling an infrastructural role. However, this gradually shifted during Maduro's tenure, adopting a combination of infrastructural and despotic power to quell protests and uprisings against his government. In contrast, in Colombia, military power, initially focused on its role as infrastructural power, utilizing legitimate coercion, later shifted toward a despotic role due to excesses during the peak of the internal conflict under perverse incentives. These dynamics underscore the adaptability of military power to fulfill diverse roles and missions.

Civilian militarism entails the mobilization of military power to execute extreme actions in both the political and military domains. However, it is worth noting that this trajectory may not bode well for the health of democracy.

In Venezuela, the Bolivarian strategy led by Chavez deemed the fusion of civil and military authorities as highly necessary, challenging the prevailing perspectives on the separation of these two entities in modern democracies. The objective was to incorporate military power into the social and political spheres and later a progressive fusion among these.

To achieve this goal, the incumbent worked to include a legal framework for the military's role in the new constitution of 1999. Article number 328 emphasized that the military was responsible not only for ensuring national independence and domestic order but also for actively participating in national development. This implied that the military would engage in non-military missions as part of its duties. This approach was further supported by the enactment of several "Leyes Orgánica de Seguridad Nacional" or "Organic Laws of National Security" in 2002, 2005, 2008 (during Chavez's tenure), and 2014 (after Maduro assumed power). These laws legalized military involvement in non-military activities, incorporating

concepts like "integral development," cooperation between civilian and military authorities, and military control over civilian authorities in case of emergencies through presidential orders. The 2014 organic law explicitly emphasized the military's role in integral development, granting the incumbent significant power to involve the military in multiple fields.

This legal framework facilitated the appointment of active and retired military personnel to key bureaucratic and governmental positions, a crucial aspect of Chavez's strategy. This was possible, in part, because civilian bureaucracy had lost credibility within civil society due to its poor management over the years (Poleo, 2002, 9). However, later on, this practice was also employed to solidify the Maduro government's hold on power.

Throughout Chavez's presidency, he consistently reaffirmed the idea that military power should play a pivotal role in non-military domains for the greater public good. In one episode of *Alo, Presidente* (Hello, Mr. President), a national talk show, Chavez addressed:

You, the military, must actively engage in the economic frontlines. I want the Venezuelan Armed Forces to become increasingly involved in the economic development of our nation, using various approaches. Additionally, I expect you to play a pivotal role in the political arena, fostering patriotic awareness and upholding the principles of the Bolivarian ideology (Chávez, 2009, 7).

In this regard, within the framework of the Bolivarian strategy, the military gradually became more involved in controlling the state apparatus and assuming various political positions under the leadership of both Chavez and Maduro. Chavez, in particular, viewed the military as the "new liberators of Venezuela" (Chavez, 2009, 5). This was useful for improving state capacity and also for reconstructing the state itself.

Conversely, in Colombia, under the Democratic Security strategy, Uribe believed that military power was imperative to re-establish state authority across the country, which had

been affected by various illegal groups. Similar to Chavez emphasized the necessity of honoring the military profession and putting in extra effort to garner support (Uribe, 2002, 12). However, unlike in Venezuela, where the military primarily served as an infrastructural power within the Bolivarian strategy, in Colombia, the military's primary role was to exert both legitimate and illegitimate coercion.

In the official discourse, especially during Uribe's second term, he introduced the concept of the "Doctrine of Integral Action." This doctrine involved the consolidation of territories reclaimed by the military from illegal groups, followed by the extension of state institutions into these territories. It served as a clear example of state capacity consolidation (Ministerio de Defensa Nacional, 2007, 7). Unlike many instances in Colombian history, Uribe compelled the military to fulfill their coercive role under the threat of dismissing those incapables of performing their duties.

Consequently, under constitutional rules, the military played a role as an infrastructural power, but Uribe exerted direct control over them. Many decisions were made by Uribe without the need for mediation with other democratic authorities, at times surpassing the responsibilities of civilian ministers of defense. One source illustrates the extent of Uribe's control over the military:

Concerning military operations, the nation is witnessing a president deeply committed to taking direct action in this domain. This president personally reaches out to brigade and battalion commanders, displaying a notable disregard for the conventional "chain of command." Their determination is unwavering, and they are fully committed to pursuing their objectives, even if it entails implementing unpopular measures like the wealth tax to bolster the financing of the Armed Forces (Revista Cambio, 2002, Nro. 490, 20).

In this regard, the pressure on military power ended up leading them to assume a despotic role, disregarding human rights considerations, and resorting to killing innocent people in

their efforts to defeat left-wing guerrillas, primarily the FARC, following the guidance of the incumbent. The magazine *Cambio* described this kind of behavior as *De cualquier manera* [at any cost], signifying the willingness to do whatever it takes to carry out orders (Revista Cambio, 2008, Nro. 772, 12). Nevertheless, despite Uribe's attempts to promote legislation that would grant the military a more extensive role in security matters, including intelligence services, apprehending suspicious individuals in flagrante, and performing judicial police activities on the battlefield, all of these proposals were rejected by the opposition in Congress and by the Colombian Supreme Court (Boesten, 2016).

While military power oscillated between being a source of infrastructural power and despotic power in both countries, it operated differently, each aligned with the respective political strategy's perspective on addressing state capacity deficiencies. In Venezuela, military power was intended to serve as an infrastructural tool, albeit through mechanisms that leaned toward despotism, such as enacting a set of laws under enabling laws [*leyes habilitantes*]. This was because military involvement in civil and political roles was meant to be carried out by civilian authorities. However, both Chavez and later Maduro relied on the military to assume multiple positions, including city mayors, managers of mineral industries, control of official supermarkets, infrastructure management, and construction, among others. In Colombia, too, military power was initially employed as infrastructural power, utilizing the legitimate coercion of the state. However, over time, it shifted towards a more despotic nature, particularly during Uribe's terms, though this changed under Santos' administration.

In both countries, military power aimed to address state capacity deficiencies, as previously discussed. However, this approach undermined democratic principles related to deliberation and consensus-building among different democratic institutions and when coercion was used without following the rule of law, at least in the case of Colombia. In these circumstances,

the military became omnipresent in both countries, serving as a stabilizing force for the state's existence and becoming an explicit feature of militarism, endorsed by civilian leaders.

#### **4.3.1. Threats, Roles, and Missions for the Military Power**

Due to its bureaucratic nature, the military emphasizes the significance of maintaining a well-established set of guidelines for their profession. This allows them to act cohesively and replace individuals in case of need or contingency. Military power is regarded as a profession characterized by expertise, responsibility, and corporateness (Huntington, 1964). In some respects, this aligns with Mann's ideas regarding the autonomy of military power from political power because they possess their inner dynamics. Therefore, to comprehend how military power operated within the Bolivarian and Democratic Security strategies as either despotic or infrastructural power, it is essential to understand the threats, roles, and missions they undertook.

Recent literature has highlighted a gap in scholarship concerning the differentiation between the roles and missions assigned to the military. This distinction is crucial for understanding why they sometimes become involved beyond their typical duties. Harig, Jenne, and Ruffa argue that "there are potential benefits in delving deeper into the ideational complex where role conceptions, professionalism, securitization, culture, and other concepts overlap to examine how these interact and constitute one another" (2022, 16). In this regard, Wendy Hunter provides a comprehensive framework. According to her, a role represents the primary purpose of the military, guiding their overall performance, and may be domestic or international in nature. In contrast, missions refer to specific duties assigned by civilian authorities to be carried out on the ground (Hunter, 1996, 1).

Roles and missions are assigned based on political and strategic considerations, particularly in response to the types of threats or challenges a state faces during a specific period, which

may change over time. An impactful example illustrating how Venezuelan military power embraced many of the tenets of the Bolivarian strategy is provided by a military student at the Advanced Institute for the Study of National Defense. He expressed that "The most efficient way to combat drug trafficking, crime, violence, and insurgency was through an economic program of national development while concurrently promoting a moral and cultural revival" (Aranguen, 2003, 115). This perspective does not primarily emanate from a military standpoint; instead, it demonstrates how the military had internalized numerous aspects of the Bolivarian strategy concerning how to address the multifaceted challenges they confronted during that era.

Understanding how threats influence the performance of military power is crucial in this context. In Venezuela, these threats encompassed the need to combat criminality, contend with high levels of violence, address the Colombian insurgency at the border, tackle issues such as hunger, poverty, and socio-economic exclusion, and also consider the United States as the primary external threat to Venezuela. In contrast, in Colombia, the threats included left-wing insurgents classified as terrorists, dealing with organized crime, combating the illegal arms trade, addressing the issue of kidnapping, and, to a lesser extent, countering any external forces that posed a threat to Colombian sovereignty.

Both constitutions stipulated that the military must guarantee independence and sovereignty. In this respect, the role was both international and domestic. However, in both countries, missions focused on the domestic realm more than those related to the international scene, following the postulates of strategies and incumbents, with some exceptions such as the bilateral tension between both countries in 2008, which I will discuss in the next chapter.

In Colombia, the missions were primarily focused on the internal conflict. Particularly, these missions aimed to defeat left-wing guerrillas, take control of areas under their influence,

launch offensive operations against them, prevent kidnappings, and eradicate illegal crops such as coca and poppy that funded their military activities, all in an effort to regain state control of territory (Ministerio de Defensa, 2003, 33).

In Venezuela, many military missions were, at least rhetorically, focused on protecting the country's sovereignty from external threats, which intensified between 2005 and 2007 due to the tension with the United States and Colombia. However, on the ground, many missions were linked to the Bolivarian strategy, contributing to domestic national development. These missions involved supporting governmental agencies responsible for economic and social development, maintaining domestic peace and order, and contributing to national production. In Venezuela, the involvement of the military in non-military missions became the norm, thanks to a set of laws and regulations that allowed it. In contrast, in Colombia, the missions of the armed forces were primarily limited to actions related to the internal armed conflict, with modifications mainly focused on improvements in tactical performance.

Collectively, these elements provided a framework for military performance. In this regard, the preferences of the military, in a subordinate relationship, aligned with the political strategies of the incumbents in both countries. The military were not able to impose their perspective; instead, the strategies of the incumbents and their interests became more influential and powerful than those of the military.

However, accomplishing this goal demanded more than a passive acceptance by the military power. This entailed a series of actions to persuade the military to accept the incumbents' political strategies, a not easy task considering the autonomy traditionally exercised by them.

#### **4.3.2. Persuading Military Power**

Peter Feaver (2011) suggests that a complex paradox exists in democratic regimes concerning military power, revolving around the idea of "protection by the military and protection from

the military." In other words, military power is bolstered to safeguard the political regime, but concurrently, mechanisms are instituted to restrain any potential actions by them against democracy. These mechanisms aim to ensure the military's subordination in two main ways. Firstly, there are efforts to encourage alignment with the political regime. Secondly, incentives are created to guarantee this subordination. Despite the military demonstrating sympathy towards the incumbents and aligning with strategic goals in both Venezuela and Colombia, one of the most critical actions was ensuring that military power followed the orders and duties granted by these incumbents. Obedience is perhaps one of the most distinctive features of the military, setting them apart from other sources of power, as it implies a willingness to risk their lives when necessary. However, obedience and subordination are not guaranteed *per se* due to military interests and values. Examining Venezuela and Colombia sheds light on how military power aligns with incumbents' militarism to become a source of despotic and infrastructural power within the bounds of democracy.

One powerful mechanism to gain the sympathy of military power is through prerogatives and incentives. Prerogatives refer to a set of privileges granted to the military to ensure their subordination to political power, specifically in the context of incumbents' political strategies. Classic literature has pointed out that regimes that grant fewer prerogatives to the military tend to be more democratic, while those with numerous prerogatives tend to lean towards authoritarianism (Stepan, 1988, 93-102). Thus, prerogatives are essential for securing the role of military power as infrastructural and despotic power within the political strategies of incumbents, fostering complete loyalty beyond constitutional subordination. This phenomenon occurred in different forms within both the Bolivarian and Democratic Security strategies.

In 2002, Chavez faced a failed military *coup d'etat*. Subsequently, to prevent any future insubordination, he conducted a purge, removing military personnel with ideas contrary to those of the Bolivarian strategy. (Semanario Quinto Dia, 2002, Nr. 300, 19). Simultaneously, he ensured the preservation of historical prerogatives for the military. For instance, the position of Minister of Defense remained in the hands of an active military officer. Furthermore, Chavez complemented these with new ones, such as the appointment of active and retired military personnel to civilian positions, where they played key roles in advancing his political strategy. These appointments offered better salaries. Likewise, Chavez also maintained a distinct jurisdiction for military justice.

Additionally, the Venezuelan military assumed control of all industries related to the military sector, becoming a significant source of financial resources. This included an increase in military expenditure, involving the local production of AK-103 and AK-104 rifles purchased in Russia (Barboza, 2007, 28-29).

In Colombia, a similar approach was taken as all military industries were placed under the control of the military, active or retired. However, the position of Minister of Defense continued to be held by a civilian. The military also retained autonomous jurisdiction over legal matters. This prerogative was particularly controversial in Colombia due to well-founded accusations of human rights violations committed by the Army, leading to a clash with other democratic forces, particularly the Colombian Supreme Court, which ordered these cases to be removed from military jurisdiction (Revista Semana, 2006, Nr. 1276, 68).

Another means through which incumbents can ensure alignment with their political strategies is by offering incentives and privileges to the military, with the aim of garnering unconditional support for their political strategies and creating mutual benefits. Both Chavez

and Uribe adopted this approach by providing the military with various economic benefits, including better salaries.

Numerous sources indicate that Chavez gained the sympathy of the military by significantly increasing their salaries. Although the exact amount is unclear, one source suggests that between 2003 and 2004, wages for soldiers and generals were raised by 50% (Semanario Quinto Día, 2004, Nr. 389, 15). Additional benefits such as easy access to housing and car purchases, as well as extended credit opportunities during troubled economic times in Venezuela, were also extended to the military.

In Colombia, Uribe responded to historical demands from the military by enhancing economic benefits for those serving in combat areas. These benefits included improved retirement packages for professional soldiers, reduced active-duty requirements for disability pension claims, extra allowances for those serving in high-risk combat zones, housing credits, and benefits for retired military personnel who had served in risky combat regions (Yaruro, 2012, 24-25).

Another category of incentives was closely tied to the specific strategies of Chavez and Uribe. In Venezuela, Chavez encouraged military personnel to resign military commissions and run for politically elected positions. Those who aligned strongly with his political program were appointed to government and civilian positions, including ministries, embassies, mayorships, governorships, and various state services (Martínez & Barraez, 2009, 18-19). These individuals were perceived as privileged by their military peers.

In Colombia, military personnel who demonstrated effectiveness against illegal armed groups were promoted within the military hierarchy and celebrated publicly as national heroes in an atmosphere characterized by militarism and triumphalism. Conversely, those who did not achieve favorable results were promptly discharged, at the discretion of the President.

However, this policy had an unintended and malevolent consequence: officers aspiring for the *Medalla de Orden Público* [Medal for Public Order], a prestigious award facilitating rapid career advancement, needed to prove that their units had captured 500 enemies and killed 150 illegal combatants (Revista Semana, 2004, Nr. 1165, 40). In the same perverse logic, non-commissioned officers and soldiers were granted days off from highly risky combat areas or received special meals as incentives. This led some soldiers to commit atrocities, including killing innocent civilians, to demonstrate their combat effectiveness and become eligible for these benefits (Revista Semana, 2008, Nr. 1343, 42-43).

Prerogatives and incentives played a crucial role in gaining the loyalty of the military in both Venezuela and Colombia, but the specific emphasis and outcomes varied due to the differences between political strategies and contexts. These strategies were tailored to meet the unique challenges and objectives faced by each country's leadership. Understanding these nuances is essential in comprehending the dynamics of military loyalty within these democracies.

#### **4. 4. Civilian Militarism and the Sympathy of Military Power**

In the context of democratic regimes, it is important to explore how civilians not only gain popularity, as I mentioned in the previous chapter, among society but also within the military. This is a definitive feature that allows me to refer to civilian militarism because, through this process, incumbents can ensure the loyalty of the military and leverage it for their political strategies, thereby enhancing their prestige in the public arena. To achieve this, presidents strive to depict themselves as the epitome of soldiers in these countries. Despite my suggestion that Chavez, due to his military background, understood the military ethos in dealing with the armed forces and, therefore, is categorized in this dissertation as a “martial president,” and Uribe, lacking a military background but considered a “strong president” who

encouraged the military in the context of security threats to the state, there is one common feature that makes them similar in terms of their actions: their roles as supreme commanders of the military within the constitutional and democratic frameworks of both countries.

This is a critical aspect to comprehend how militarism, under their leadership, became prevalent in these countries and gained acceptance among the general population and the military itself. In this type of context, "the president wields ultimate authority over the use of military force, and a series of complex institutions determine which options the president receives and how many" (Davidson, Brooking, & Fernandes, 2016, 3). This authority is guaranteed under a rational-legal framework, as per the classic postulates of Weber (1978, chapter 3).

In this relationship, this grants them both authority and legitimacy. However, their charismatic leadership also played a crucial role in garnering sympathy from the military, coupled with the prerogatives and incentives offered to them. A consistent pattern that emerges from empirical research on this topic is the notion of these incumbents embodying the figure of the ultimate soldier of their respective countries, underpinned by democratic legitimacy. They were not just democratically elected civilians; they also represented the local populace's perception of what a soldier with martial traits should be.

Chavez, as a former military officer, frequently donned military fatigues, berets, and military symbols during public events, while consistently reaffirming that his mandates were the product of citizens' decisions. In the case of Uribe, despite his lack of a military background, which drew criticism from the opposition, especially given Colombia's mandatory military service due to the need for manpower in dealing with the internal conflict, he sought to compensate for this deficiency by actively assuming the role of commander in chief of the Colombian military forces. He engaged in activities alongside soldiers across the country and

expressed unwavering support for their sacrifices on behalf of the nation. The idea was to promote the military's commitment to the incumbents' political strategy through leading by example, demonstrating discipline, multitasking skills, authority, sacrifice, and paternalism. Two quotes from primary sources perfectly encapsulate this concept of embodying the idea of the ultimate soldier of the nation. In a public speech in 2009, Chavez stated, "Bolívar once said, 'When I am in the Army, I am in my own center.' I reiterate: When I am among soldiers, I am in my own center. Because it's my essence, I am a soldier" (Chávez, 2009, 3). Likewise, Uribe expressed a similar sentiment in one of his speeches before assuming the presidency: "If I win the Presidency of Colombia, I aspire to lead the Armed Forces, day and night, as the nation's first soldier. I am confident that this will greatly assist us in producing results, with the civilian executive committed day and night to directing and supporting the Armed Forces" (Uribe, 2002, 53-54). Both examples illustrate how these incumbents endeavored to publicly establish their authority and legitimacy, particularly among the military establishment.

In both cases, the military exhibited a high degree of receptivity to the ideas put forth by these incumbents, because they believed that these leaders represented the institutional perspective regarding the realities and the role that the state and military power should play in both countries. Although there was resistance, particularly in Venezuela concerning the Bolivarian strategy, which was evident in a failed *coup d'état*, the president gradually gained control over the military, employing his discretionary powers as the head of state to discharge elements that were not loyal to his leadership.

As commanders in chief of the military, both Chavez and Uribe succeeded in transforming the military establishment in these countries like never before. However, in Venezuela, this transformation amounted to a reform, entailing radical changes within the military, whereas

in Colombia, it was more of a military transformation that involved adjustments at the tactical and operational levels rather than a complete overhaul of the military institution.

In Venezuela, in 2007, a new motto was introduced for the military forces: *Patria, socialism o muerte* [fatherland, socialism or death]. This motto was closely aligned with Chavez's strategic approach, which included a shift towards left-wing politics, a topic I will discuss further later on. This shift in doctrine was influenced by several civilian leaders and a handful of military figures. After years of deliberation, Chavez successfully implemented a military reform known as the "New Venezuela Military Doctrine" in 2008. This doctrine aimed to safeguard the country's vast oil reserves through two key elements. First, the concept of the "New Venezuelan military thought," which integrated Bolivarian ideals and emphasized the collaboration between the armed forces and the civilian population in national defense and developmental missions. Second, it focused on preparing for asymmetrical warfare to protect Venezuela's natural resources, drawing inspiration from examples of popular resistance in Cuba, Vietnam, Iraq, and Afghanistan (Aponte, 2011). Despite some military opposition to this new reform, the majority of personnel enthusiastically supported it, according to a military source, this aimed to "outline the foundations for the development of a theory of warfare applied primarily to the specific Venezuelan reality but with a global scope" (Rios, 2006, 19).

In Colombia, Uribe also managed to carry out a military change under his leadership despite facing opposition from some sectors of the military. This was partially sponsored by the "Plan Colombia," a United States initiative aimed at providing economic support to the Colombian military in their fight against illegal armed groups involved in drug trafficking. This plan was established in 1999 but reached its peak during Uribe's era (Hylton, 2010). To combat illegal armed groups, and following his political strategy, Uribe issued orders for the military to

create *Comandos conjuntos* [Joint commands]. These operational units were composed of members from all military branches and were placed under the command of a single commander, deployed to a specific area with well-defined military goals. Despite facing opposition from several high-ranking military officials who were subsequently discharged (Revista Cambio, 2004, Nr. 582, 18-20.), these Joint Commands demonstrated their military effectiveness on the battlefield. Notably, the "Patriot Plan" successfully reclaimed extensive areas in the southern jungles of Colombia that had been under the FARC control under the military action of the *Omega Task Force*, one of these joint commands. Furthermore, under these new military commands, several high-value targets of the FARC were eliminated, and hostages held by this group were rescued between 2006 and 2010, reaffirming military effectiveness.

Under the leadership of both incumbents, critical military changes were implemented. However, due to Chavez's former military status, he may have had some connections with the military to achieve it easily, however, he left the army with the rank of colonel, which is a relatively low officer rank in the Venezuelan military. This rank was not sufficient to influence top-ranking military officials during their respective terms. In Venezuela, this reform had a significant impact on the military structure, while in Colombia, the military changes constituted a transformation because this did not imply a huge reform of the military structure. Both changes were widely accepted among the military, highlighting how incumbents led to a military change that was integrated into their political strategies, granting them not only legitimacy and authority over the military, but also empowering them in the barracks. Thus, militarism originated from civilian elected authorities proves to be well articulated and above the military's interests as a group. These military changes not only

fostered a militaristic atmosphere but also proved to be influential in the long term due to the influence of military power (Malešević, 2016) but embedded into political strategies.

#### **4.4.1 Politicization versus Professionalization**

Civilian militarism entailed the glorification of war and military power by incumbents, permeating these societies and even the political landscape, particularly in the case of Venezuela. Military institutions welcomed changes and were open to the influence of leaders like Chavez and Uribe. However, profound differences between the two cases have had lasting impacts on both Venezuela and Colombia.

In Venezuela, civilian militarism marked a systematic process of politicizing military power under the leadership of the incumbents, first Chavez and later Maduro. It commenced with the introduction of the military vote for military personnel, a new right granted to them in the 1999 Constitution. This move allowed Chavez to garner significant military support in elections, accompanied by a purge of military personnel not aligned with their political strategy (Trinkunas, 2013, 127). Many military also joined the United Socialist Party of Venezuela, a prerequisite that enabled them to advance within the military hierarchy, fostering close ties with Bolivarian ideals, including a unique fusion with socialist principles. Furthermore, Chavez appointed numerous military personnel to administrative and governance roles, engaging them in a wide range of activities, including healthcare and educational missions, neighborhood protection, the oversight of state supermarkets known as *Mercal*, and the management of several strategic industries (Correa, 2005, 58). Paradoxically, this approach led to a diminishing of the professionalization of military power in Venezuela, particularly if we consider it in terms of an increase in military expertise.

In Colombia, the phenomenon of civilian militarism, initiated by Uribe and continued to some extent by Santos, yielded different outcomes. This process played a pivotal role in the

re-professionalization of the military and even their re-militarization, bolstered by increased military capabilities resulting from local initiatives, support from the United States, the challenging combat experiences against the FARC, and international condemnation of abuses against the civilian population. The efforts to bring about military change gained momentum, particularly in the aftermath of the peace agreement with the FARC in 2016. I refer to this process as “re-professionalization,” in line with Huntington's concept of military professionalism, which involves the acquisition of technical knowledge for the application of state-led violence (Huntington, 1985, 11-13).

While certain segments of the military establishment developed strong ties with Uribe as the natural leader of the Democratic Security strategy, these connections waned during Santos's presidency, influenced by the optimism surrounding the peace process and the backing of domestic and international actors. Many military figures who had supported Uribe retired and became politically active in the Association of Retired Military (Ascove). Despite their vocal opposition to peace negotiations with the FARC since 2012, their influence was insufficient to derail the negotiations.

In this context, whereas civilian militarism in Venezuela politicized military power under the direction of civilian elected incumbents, in Colombia, military power underwent a process of re-professionalization and even re-militarization under civilian leadership. Including an unexpected consequence, as Colombia saw an increase in elite combatants who, for the first time in its history, engaged in international conflicts as military contractors or mercenaries (Collins & Parker, 2021). During the terms of Chavez and Uribe, both societies were surrounded by militarism, but in this case, it was orchestrated by civilian authorities. These trends continued during the presidencies of Maduro and Santos.

#### **4.5. Civilian Militarism and the Military power at the Edge: Maduro and Santos**

As a key institution in the political strategies of Chavez and Uribe, military power became part of the legacy and political capital transferred to Maduro and Santos, as I referred to in the previous chapter. In both countries, official forces and the opposition tried to gain the support of military power, creating a scenario of high politicization of them, though exacerbated in Venezuela. In this country, once Chavez passed away and Maduro became the new president, he unexpectedly deepened the military's involvement in non-military activities, spanning political, social, and economic realms. This occurred not only because he lacked a military background but also because Maduro did not possess Chavez's charisma in dealing with the military.

Maduro exacerbated the previous government's trend; in this case, he granted the military full control of mineral companies, including the state-led company PDVSA, as well as companies responsible for food production that had been expropriated, among others (Transparencia Venezuela, 2020). In some respect, Maduro purchased the loyalty of the military, who became his protectors against several protests and local and international condemnation. They were also able to control strategic resources, including food distribution among the population. His regime progressively transitioned to authoritarianism, supported by civilian militarism. The military also gained control over social realms through laws related to enlistment and military education for the population, which provided them with significant contact with civilians.

In Colombia, during Santos' tenure, civilian militarism lost synergy, although remnants remained active in the form of militarist opposition. This happened primarily because his main goal was to secure a peace agreement with the FARC rebel group, using the military as a source of infrastructural power while minimizing the potential for despotic actions and

human rights violations. Santos was acutely aware that such actions could undermine the credibility of the peace process in the eyes of the international community.

Santos engaged with the military, particularly those who supported the more radical wing of the Democratic Security strategy. He provided them with legal counsel concerning extrajudicial killings, and he even appointed a highly respected military figure as part of the government negotiation team during the peace process (Cruz, 2015). Similarly, he took several actions to enhance the military's prestige in society, presenting them as a powerful force that played a crucial role in persuading the FARC to engage in the peace dialogue. As a symbolic gesture, combat badges were awarded to be worn on uniforms to commemorate the defeat of the FARC, while concerted efforts were made to demonstrate to the military that they had reached a high level of professionalism, making them eligible to become part of international alliances like NATO, as an extra-regional ally.

Therefore, while Maduro heavily relied on military power to maintain his government through extreme politicization in Venezuela, Santos focused on enhancing the role of the military as a professional institution subordinate to civilian authorities in Colombia. This approach was made possible due to Santos' prestige among the ruling classes and the international community.

In the Colombian context, there was a more prominent emphasis on increasing state capacity compared to Venezuela. The Colombian government, particularly under President Santos, pursued policies aimed at strengthening state institutions and consolidating their capacity to govern effectively. This approach was particularly evident in the government's efforts to negotiate a peace agreement with the FARC rebel group.

Santos focused on achieving a peace deal that not only ended the armed conflict but also aimed to address the root causes of the conflict, such as social and economic inequalities, and

to integrate former combatants into civilian life. This required a concerted effort to build state institutions capable of extending governance into areas that had long been affected by the conflict.

In contrast, Venezuela, under the leadership of Maduro, appeared to prioritize maintaining the government's hold on power rather than concentrating on state capacity consolidation. Maduro's regime became increasingly authoritarian, relying on the military for political support and suppressing dissent. While the military played a crucial role in propping up the government, its involvement appeared more focused on securing the regime's survival than on strengthening state institutions and governance.

#### **4.6. Conclusion**

The emergence of civilian militarism in both countries resulted from a combination of multiple crises and the urgent need to restore state capacity using the military by civilian elected leaders. The consolidation of civilian militarism involved the glorification of military power as a central component of incumbent leaders' strategies. This entailed the widespread presence of military personnel in various spheres to achieve political objectives, such as enhancing state capacity and the functionality of the state apparatus. This trend was taken to an extreme in Venezuela.

Militarism, orchestrated by the incumbents, cultivated a militaristic atmosphere in both nations. This was not solely due to the militaristic discourse of leaders like Chavez and Uribe but also because of the alignment of military power with the strategies of the incumbents. Military power was positioned as a source of infrastructural and despotic power. This convergence facilitated the consolidation of civilian militarism in both countries. Consequently, the alignment of political strategies, roles, missions, and military power, along

with the co-optation of the military by the incumbents, naturally led to the routinization of civilian militarism.

It is worth noting that the militaristic atmosphere responded differently to each country's scenario. Interestingly, the responses in each country were grounded in the already predominant perspectives of subtle militarism, which were further deepened under the leadership of civilian elected leaders who meticulously organized a series of practices, procedures, and actions involving the military, albeit in different roles and missions.

The leadership of both incumbents played a pivotal role in effecting changes within the military. These changes were driven by their own initiatives and prestige, as they were seen as the ultimate soldiers of the country. Their actions adhered to the tenets of their political strategies, resulting in a military reform in Venezuela and a military transformation in Colombia.

Moreover, the change in leadership with the Santos administration marked a shift from the democratic security platform to an orientation aimed at achieving a peace agreement with the FARC. In this regard, political strategies and the perspective of incumbents played a crucial role in the involvement of military power and the diffusion of civilian militarism. Nevertheless, democratic institutions and a renewed perspective under a new president prevented the military from becoming omnipresent in Colombia, although their influence remained significant, operating within the boundaries of the military profession.

In summary, the disparities in the role of military power in both countries under civilian militarism can be encapsulated by a quote from Venezuelan politician Domingo Rangel: “The Colombian military is a warrior; the Venezuelan military is a bureaucrat.” (Rangel, Domingo 2006, 4).

## CHAPTER 5 CIVILIAN MILITARISM AND STATE CAPACITY

### 5.1 Introduction

Perhaps one of the most common ways to analyze militarism has been through quantitative data, including hardware and military personnel that represent the military might of a country, and these make it easy to compare countries in the global context. This usually is used to detect if there has been an increase in preparedness for war or unexpected aggressivity in a particular period. Gusterson and Besteman assert that “scholars tended to frame militarism as something that could be measured through statistics on the percentage of GDP devoted to military expenditure, the frequency of military coups, the role of military officers in politics, and so on” (2019, 53). Although useful to denote this phenomenon, these observations were made because they are easy to quantify. However, this approach misses other elements by not including more subtle ways that militarism is present and embedded in a society, particularly in the context of democratic regimes where the presence of the military is sometimes less evident. Militarism, as I showed before, can be seen as discourses that call to war and preparation of this, including indeed a set of actions and attitudes promoting the glorification of military power and its actions to fulfill political goals that under special circumstances may emerge in a radical form.

Several authors, from Vagts (1959), passing to Mann (1988, 2016), to Gusterson and Besteman (2019), consider that militarism is more than hardware, encompassing attitudes such as actions and discourses associated with the preparation of war and the state of readiness, usually responding to geopolitical competition, as Mann has considered. For him, “the greatest contributor to militarism is the multi-state system in which warfare has been a normal and often rational element throughout recorded history” (Mann, 1988, 144).

However, in this chapter, I will endeavor to demonstrate that despite the struggle between Colombia and Venezuela fueled by international disputes framed within the rivalry of allies such as the United States and Russia, civilian militarism did not emerge or consolidate for geopolitical reasons. On the contrary, it emerged and was primarily consolidated due to domestic factors associated with state erosion propelled by neoliberalism and the political goals of Chavez, Maduro, Uribe, and, to a lesser extent, Santos, responding to political and occasionally military needs on the domestic front. Even though Colombia represented a right-wing government and Venezuela a left-wing one, which could fuel the proclivity for interstate war. Thus, when a clash between both countries emerged, and despite the exacerbated militaristic atmosphere in both countries, the tensions were halted by civil society and the action of the Latin American community. In this respect, Latin American identity played a critical role in de-escalating this conflict, reaffirming that Latin America is a region that does not have a proclivity for interstate wars. This challenges some of the ideas of democratic peace regarding the region, claiming that democratization was useful *per se* to consolidate a peace zone across the region (Kacowicz, 1998; Russett, Layne, Spiro, & Doyle, 1995). Although, in some cases, undercover forms of interference had an impact on destabilizing interstate peace, these were not enough to prompt a war (Aviles, 2005). Critical for this dissertation is the idea that the lack of these interstate wars constrained the chances of increasing state capacity, usually associated with the existence of an international enemy (Tilly, 1985; Centeno, 2002). Then, civilian militarism embedded in the political strategies of incumbents intended to fulfill this role of increasing state capacity using militaristic attitudes, practices, and actions, although being cautious regarding the international front, focused mainly on the domestic one. In this respect, this challenges the idea of geopolitical

militarism suggested by Mann (Mann, 2012, 86), at least considering the Latin American experience.

In this respect, something crucial for this chapter is to analyze how military power and civilian militarism assert the threat of the use of coercion or actually employ it to enhance state capacity and/or control and maintain political power by the incumbents. Firstly, I will examine the arms race that occurred in South America, particularly in Colombia and Venezuela, and how this influenced bilateral perceptions and the rivalry between both countries. Secondly, I will analyze how the rivalry between these countries had some relation to the projection of confrontation between the United States and Russia in Latin America. Thirdly, I will investigate how civilian militarism contributed to the militarization of law enforcement in these countries. Fourthly, I will scrutinize how these presidents execute a form of presidential militaristic diplomacy as a projection of their political projects. Fifthly, I will examine the bilateral dispute that occurred in 2008, which almost led to a war between both countries, and how civil society was able to control civilian militarism. Finally, some conclusions will be provided.

## **5.2. Arms Race and Sovereignty**

Political ideology has played a critical role in Latin America due to the long history of clashes between the status quo forces, typically associated with right-wing governments supported by the United States, and left-wing defiant forces, including political movements and several insurgencies that have violently confronted states over the years. At the turn of the new millennium, a wave of left-wing governments was democratically elected across the region, an occurrence unprecedented in Latin American history. While in the past, some governments with this political trend were elected, notable cases such as the elections of Jacobo Arbenz in Guatemala (1951), João Goulart in Brazil (1962), and Salvador Allende in Chile (1970), all

ended in their overthrow by military *coup d'états* sponsored by the United States a few years later, under the ideological logic of the Cold War.

In this context, the new left-wing wave during the early 21st century was an astonishing event, not only because of the number of governments with this political orientation but also due to its significance resulting from the radical policies implemented. Among these governments were figures such as Hugo Chavez (Venezuela), Rafael Correa (Ecuador), Michele Bachelet (Chile), Lula da Silva (Brazil), Evo Morales (Bolivia), and many others. However, in other countries, and even in those that had previously elected left-wing governments, right-wing presidents were chosen, serving as a counterbalance to confront the fear of the emergence of "socialist" or extremist governments, typically associated with Cuba and the authoritarian regime of Fidel Castro. Among the right-wing governments were Alvaro Uribe (Colombia), Vicente Fox and Felipe Calderon (Mexico), and Sebastian Piñera (Chile), among others.

Meanwhile, while the left-wing governments advocated for state intervention in the economy and political programs to reduce inequality and support marginalized groups; the right-wing governments aligned with the status quo, calling for a reduction of state intervention in the economy and supporting neoliberal policies, believing these measures would reduce structural poverty through a spillover effect (Levitsky & Roberts, 2011; Dominguez, Lievesley, & Ludlam, 2011). The extreme left-wing governments adopted an anti-United States discourse and sometimes became hostile to this country, its intervention in domestic politics, and its allies across the region, primarily the right-wing governments.

Thus, despite their democratic election, the rivalry and incendiary discourse among these leaders grew exponentially in the first decades of the 21st century. In this respect, the democratic peace perspective could be applied here to show that the limited chances of a

military confrontation between countries with different political trends are under the premise that democratic regimes do not fight each other (Russett, Layne, Spiro & Doyle, 1995; Kacowicz, 1998). However, the ideologies and political stances of the incumbents, as conveyed through public discourses and applied policies, on the contrary, exacerbated the tension between countries based on their political trends.

Considering one of the sources of social power pointed out by Mann—in this case, ideological power that mobilizes values, norms, and rituals providing a sense of the world and a way to act in it, which is extremely powerful for nation-states (Mann, 2005, 30)—the difference between left and right ideologies, according to Bobbio and Cameron, is related to the contemporary world on how governments should manage their countries to obtain political and economic equality and what the role of the state in the economy should be (1996), creating different views and rivalries between countries.

In this line, are political ideologies sufficient to fuel rivalry between countries? Considering that Colombia and Venezuela had governments with two different political ideologies, the rivalry, coupled with civilian militarism, could have exacerbated tensions between these countries. Actually, the historical rivalry between Colombia and Venezuela was always present due to territorial disputes around the Venezuelan Gulf and Guajira Peninsula, with some encounters during the Cold War, that never escalated into a military dispute but could increase the chances of a military confrontation in recent years.

A body of literature has pointed out the need to study the role of ideology in armed conflicts, producing some preliminary conclusions that, although focused on internal conflicts, can shed light on interstate conflicts and rivalries. This has concluded that internalized ideological worldviews have the potential to significantly influence, via priorities and values, the ways that a country operates regarding conflicts and rivalries. Nonetheless, despite the

ideology that can potentiate rivalries, other contextual elements are necessary to lead to a conflict (Maynard, 2019).

During the governments of Uribe and Chavez, Colombia and Venezuela had deep rivalries based on political ideological perspectives, primarily due to the ties sustained between Colombia and the United States, which served as the main international enemy for Venezuela under the Bolivarian political strategy. In one interview, Chavez pointed out, “It turns out that those who govern Colombia today, this Colombia of today, our sister nation as well, those who govern there are the antithesis of those who govern here” (Rangel, 2012, 315).

Although this seems sufficient to fuel an arms race between both countries, this antagonism was not enough to prove that the acquisition of military hardware was related to the political ideology rivalry between both countries. This is because arms races have been seen as a trait of militarism, considered one of the steps related to the preparation of war.

In the early 21st century, military expenditure across Latin America increased radically. Despite being extremely low comparatively, if we consider other regions, this situation drew the attention of several governments, scholars, and institutions, including the Stockholm International Peace Research Institute (SIPRI), which, in its report of 2008, dedicated an entire section to analyzing the unexpected increase in military purchases across the region. It pointed out that between 2003 and 2007, the transfer of military equipment was “47 percent higher than in 1998-2002.” Among the countries notorious for their increase in military purchases was Venezuela (Holtom, Bromley, & Wizeman, 2008, 304). Meanwhile, Colombia was not considered among those with an unexpected increase in military purchases.

Nonetheless, military expenditure in Colombia was higher between 1998 and 2016, oscillating between 3% to 3.9%, than in Venezuela, which ranged from 0.5% to 2% of the GDP. Despite Venezuela being one of the countries with higher military purchases in the

region in the first decades of the 21st century, the situation in Colombia, related to an internal armed conflict, led to higher military expenditure in terms of GDP.<sup>9</sup>

In this respect, the Colombian government, under the Democratic Security strategy and primarily supported by "Plan Colombia," a U.S. cooperation military program designed to confront terrorist threats associated with illegal drug trafficking, contributed to increasing the military capabilities of the country. Between 2000 and 2016, it received 10 billion dollars in support, including resources for the purchase of hardware and military training (Beittel, 2021, 32).

During the peak of this military program, complemented with domestic resources, the military capabilities of Colombia increased radically as never seen before. Colombia amassed a quantity of 280 helicopters, including Huey, Black Hawks, and "*Arpia*" helicopters, a locally upgraded attack version of Black Hawks (Haddick, 2010). Additionally, *Tucanos*, a type of aircraft from Brazil, several unmanned combat aerial vehicles, smart bombs, and 95 patrol boats were purchased. Between 2000 and 2014, 93,362 military and police personnel were trained by the United States in light infantry tactics, air maintenance, and combat leadership (Wola, 2016). Although this was perceived as a threat by some neighboring countries, including Venezuela, most of the equipment and military training were focused on the domestic front, and the chances of their use as offensive equipment in a conventional war were extremely limited.

In Venezuela, during the first decade of the 21st century, military purchases were impressive, as mentioned in the SIPRI report. Thanks to the available resources from oil exports, Chavez had enough funds to purchase hardware mainly from Russia, amounting to 4 billion dollars.

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<sup>9</sup> See SIPRI military expenditure database, available at <https://milex.sipri.org/sipri>.

The acquired equipment included 24 Su-30MK combat aircraft, 10 Mi-35 combat helicopters, 3 Mi-26 heavy transport helicopters, 40 Mi-17 multi-role helicopters, and 100,000 AK-103 rifles (Holtom, Bromley, & Wizeman, 2008, 306). For the rifles, a license was also acquired to install a local factory in Maracay, providing autonomy to Venezuela to manufacture these rifles and distribute them to different military branches, including the Bolivarian militias—an aspect that will be discussed later, aligning with the Bolivarian military doctrine of asymmetrical warfare (Barboza, 2007).

In 2009, Chavez purchased 72 T-72 MI tanks and 5 defense systems S-300PMU-1, also from Russia, further enhancing the military capabilities of the country (Buttó, 2017, 316). This spectacular purchase raised alarms in the neighborhood and led to several accusations from Washington, mentioning that Caracas intended to destabilize the region. However, this weaponry was primarily necessary to upgrade old military hardware that was ready to be retired, including the aging F-16 aircraft, which had not received parts from the United States due to a military embargo imposed on Venezuela since 2006. Additionally, there was a need to replace the old FAL rifles purchased between the 1960s and 1980s for the country (Rosales, 2006, 12; Poleo, 2006, 6-7; Loaiza, 2005, 6-7).

Although there is no doubt that the military equipment was intended to deter the United States, this was not the determining factor. In this respect, both Colombia and Venezuela were not involved in an arms race, following classical ideas about militarism (Wendt & Barnett, 1993). Indeed, the rivalry based on political ideology, despite existing, was not enough to push both countries into competition in this regard. On the contrary, the increase in military hardware in each country was more related to domestic and local needs than to preparation for war with the neighboring country, at least until that moment. In Colombia, this was due to the internal armed conflict, and in Venezuela, it was due to the need to upgrade obsolete

military hardware and to deter the United States, but mainly to maintain domestic prestige. Likewise, most of the military equipment, mainly rifles and light weaponry, were useful in both countries for domestic needs more than international ones.

Thus, the political ideological rivalry or a potential geopolitical competition between Colombia and Venezuela was not strong enough to serve as a cause for an increase in military capabilities, despite the existential differences between both countries and their leaders, primarily Chavez and Uribe. In the case of Maduro, these differences were inherited but neutralized in the cases of Santos in Colombia, who was more interested in domestic issues and less in international disputes to achieve peace with the FARC (Rodriguez, 2018b). Therefore, it is the need to fulfill the basic coercion roles of the state in the domestic realm in Colombia and the protection of sovereignty in Venezuela, serving as the fundamental elements related to state functions and capacity consolidation that led each country to increase their military arsenal (Mann, 1984).

### **5.3. Neo-Cold War and Civilian Militarism in the Andes**

Despite the military build-up not responding primarily to the competition between Colombia and Venezuela and being more related to domestic needs and processes already occurring in both countries, incumbents in Colombia and Venezuela, mainly Uribe, Chavez, and Maduro, employed an incendiary discourse discussing the need to protect their political strategies to fulfill the ultimate goals proposed. In this respect, both types of civilian militarism—one related to a right-wing perspective and the other to the left-wing—found an international atmosphere that benefited them in solidifying and even protecting their political strategies, including a militarist component that reinforced each other and was evident through coercive capabilities to protect the state against domestic and external threats. In this regard, ideological closeness to the United States and Russia, together with pragmatism, played a

crucial role in each country, relating to the civilian militarism and atmosphere that prevailed both in Colombia and Venezuela, although, less to the dynamics of geopolitical militarism. At the beginning of the 21<sup>st</sup> century, after a decade of United States predominance in the world following the fall of the communist bloc, other countries entered to compete on the world stage, including China and Russia (Brown, 2013, 35-45, & 61-70). Both had different worldviews, and their regimes were authoritarian, although with different styles. This created a dispute in the new millennium that can be cataloged as a kind of new Cold War. In this scenario, Latin America had a critical place in this dispute due to its proximity to the United States and the historical interests of this country in the region. Meanwhile, as the United States was occupied with the war on terror in Afghanistan and Iraq (Bacevich, 2008), several left-wing governments in the region decided to distance themselves from the United States' influence and look for business and geostrategic partners outside the region, including China and Russia. While China was interested in doing business without political involvement, Russia was more interested in gaining geostrategic influence across the region, in some respects threatening the United States' historical interests in Latin America, as it previously did during the Soviet era in Cuba.

Colombia and Venezuela were two countries aligned with United States policies during the Cold War, with Venezuela being a stronger ally than Colombia due to its strategic mineral resources, both under the umbrella of the Inter-American Treaty of Reciprocal Assistance (TIAR) (Rodriguez, 2006). However, things changed once Chavez arrived in political power. Meanwhile, in Colombia, due to the precarious situation of the state facing collapse at the hands of left-wing guerrillas, the partnership with the United States became stronger at the turn of the 21<sup>st</sup> century.

In this scenario of the new Cold War, civilian militarism manifested in both countries in different forms, primarily driven by the survival needs of the model led by each incumbent and their political strategy. According to Mann, militarism, to some extent, increases due to geopolitical competition between countries. In this context, some ideas of Michael J. Mazarr can provide input for the analysis. This author points out that there are four kinds of ways to understand rivalries that can fuel conflicts among countries and two of these are particularly interesting for this analysis—bilateral rivalries and militarized rivalries. Bilateral rivalries are characterized by competition between similar countries for predominance in a regional context, while militarized rivalries imply some kind of military preparedness for expansion, particularly by a state dissatisfied with its position in a regional context, called a "revisionist state," which has made changes in its ruling model to adapt to its new aspirations, somewhat similar to what happened in Venezuela (Mazarr, 2022, 26-7 & 10). Although the ambition of Venezuela was never territorial under the Chavez or Maduro governments, these incumbents were more concerned with the survival and control of their state and political regime rather than gaining territory at least until the period covered by this dissertation.

Despite civilian militarism in Colombia and Venezuela promoting an incendiary discourse, as mentioned in the previous chapters, regarding the international front, the militaristic discourse was more bluffing than reality. I will analyze this behavior in detail in the coming section. Thus, the search or consolidation of existing alliances responded more to protect domestic regimes than to conduct offensive military action against neighboring countries, particularly the closest ones, which were Colombia and Venezuela, despite militarist discourses.

In this respect, Colombia and Venezuela obtained benefits from this competition in the international arena based on political and ideological perspectives. Both countries, more than

intending to be involved in an international war, sought primarily to protect domestic interests and increase their capacity to fulfill local goals, although sometimes needing international cooperation, which was facilitated due to the rivalry between the United States and Russia in the Americas.

In Venezuela, the failed *coup d'état* against Chavez in 2002, sponsored by the United States, highlighted to this incumbent the need to increase its independence and shield its political strategy from domestic and international rivals. Likewise, to consolidate the goals of the Bolivarian political strategy that included a progressive transition toward an economy ruled by the state, it was necessary to find international partners, in this case, Russia. This country provided not only international legitimacy but also military and political support. The links with Russia not only included the purchase of military hardware, as I showed before, but also diplomatic collaboration that deterred the United States and mainly local supporters from carrying out another coup attempt. Thus, this collaboration with Russia included military exercises in the Caribbean, which, however, more than trying to compete with the United States in the region, intended to prove, firstly, that Russia could conduct these kinds of military exercises anywhere in the world, and second, to shield the Venezuelan regime, showing that Russia would support the Bolivarian strategy (Davydov, 2010; Romero, 2008). In Colombia, the alignment of the Democratic Security Strategy with the United States was embedded in a long tradition of military and political alliance between Washington and Bogotá. This alignment was further fueled by the urgent need to safeguard the Colombian state from the threat of left-wing guerrillas, which had become extremely perilous at the turn of the new millennium. Thus, during Uribe's government, which focused on democratic security and prioritized defeating these insurgent groups, the closeness with Washington strengthened. This collaboration extended beyond the war on drugs, aiming to reduce the

economic resources available to insurgent groups, and encompassed the logic of the war on terror, which was instrumental to the Colombian incumbent's political strategy. In this context, Colombia emerged as a strategic ally of the United States in the region, enjoying a unique political and military alliance. It also served as a showcase example in a region surrounded by left-wing governments strongly opposed to U.S. policies and historical interventionism (Rodriguez, 2010; Revista Cambio Nr. 723, 2007). Along the same lines, the alliance with the United States provided Colombia with protection from any international threat, including from Venezuela. In 2009, Uribe even offered to allow the United States to establish seven military bases in the country, although the Colombian Supreme Court rejected this proposal. Nevertheless, the presence of U.S. troops continued unofficially (Bitar, 2016, 119-143).

In both countries, mutual accusations of intervention and conspiracy against the neighboring country were recurrent. However, these accusations never escalated into a real military confrontation between Colombia and Venezuela. Similarly, the projection of rivalry between the United States and Russia in the Andes was limited, not only because of the predominant presence of the United States but also because Russian support for the Venezuelan regime was more symbolic than real. Nonetheless, it proved sufficient to deter domestic opposition and the United States from attempting a new coup against Chavez or Maduro. In both cases, despite potential rivalries based on political ideologies, the primary priority was to perform and shield political regimes and, to some extent, the state. Territorial integrity and autonomy were critical in both cases. Indeed, this allowed both Bolivarian and Democratic Security strategies to consolidate not only in their political phase but also in the economic one, with Venezuela undergoing a more radical transformation from a free-market economy to an economic model controlled by the state (Guerra, 2013).

Interference, backed by foreign cooperation, facilitated both countries in fulfilling their fundamental duties, ensuring the existence and survival of the state through coercion, both physical and symbolic (deterrence). Ultimately, civilian militarism in both nations leveraged this rivalry to strengthen their domestic power and influence, considering the potential for an interstate war, within the context of the tensions of this new Cold War.

#### **5.4. Civilian Militarism and Domestic Security: Colombian Police and Venezuelan National Guard**

Militarism has become a prominent topic of discussion in recent years, particularly within the domestic realm, often linked to concerns about the militarization of law enforcement. Literature in this field has experienced significant growth due to the impact of this phenomenon on civilian freedoms, liberties, and, more broadly, democracy. Recent studies have explored the consequences of the use of lethal force against citizens (Lawson, 2019) and the blurred line between civilian and military law enforcement, which tends to respond to challenges with a highly militarized approach (Flores-Macías & Zarkin, 2021). This issue is of global concern, with scholarly attention expanding exponentially to find solutions (Kraska, 2007; Phillips, 2018; Lindsay-Poland, 2016).

The term "militarization of law enforcement" denotes the adoption of tactics, weapons, and procedures akin to those employed by armies against external enemies. However, in these cases, such measures are applied within the domestic realm against ordinary citizens, rendering law enforcement susceptible to excessive force and brutality. From this perspective, there is a growing trend among police and law enforcement towards a "warrior mentality," contradicting their training to handle citizens without treating them as enemies to be subdued or killed (American Civil Liberties Union, 2014).

This phenomenon has become increasingly prevalent over the years, driven by the imperative faced by civilian governments to confront challenges and threats within the domestic realm and insufficient civilian state capacities to confront these problems structurally, even criminalizing dissent/social movements in this context (Doran, 2017). It represents one of the most palpable manifestations of civilian militarism and the progressive militarization, rather than a civilianization, of security forces that interact with unarmed citizens, a trend observed in several countries, including Colombia and Venezuela.

These countries experienced a deepening of militarization within their security forces under the Bolivarian and Democratic Security strategies. Although this process had already commenced before the initiation of these projects, it was significantly intensified by them. In Colombia, this was observed in the National Police, while in Venezuela, it was the National Guard that underwent notable changes. As discussed in the third chapter, coercion is often viewed negatively in the context of democratic consolidation but is considered beneficial for state consolidation, particularly when it is a by-product of an interstate dispute, and less so when applied in the domestic context (Centeno, 2002). However, it became a necessity for political regimes aiming to maintain control over public order.

Both the Bolivarian and Democratic Security strategies sought to not only consolidate their political projects but also enhance state capacity, with a focus on fulfilling domestic duties and addressing various challenges. Despite similarities, there were variations between Colombia and Venezuela in this militarization process.

In Venezuela, the National Guard, established in 1937 with a military character, primarily focused on preserving public order and border control, akin to the French gendarmerie or the Royal Canadian Mounted Police. During the *Punto Fijo* era, it served as the armed branch protecting the political regime led by political parties, acting as a counterbalance to the

Venezuelan army. Over the years, it gained respect among the population and instilled fear in illegal immigrants from Colombia due to its role in safeguarding the Venezuelan border. During the failed *coup d'état* of 1992 led by Chavez, the National Guard played a critical role in quelling the insurrection. For that reason, this was never entirely trusted by the military, including Chavez himself (Martinez, 2005).

The Constitution of 1999 incorporated the National Guard into the Armed National Forces, subordinating its four components to military command (including Army, Air Force and Navy). This move was aimed at controlling the law enforcement corps to prevent its potential use as a political tool against Chavez's government (Barraez, 2007, 16-17). Even during the failed coup against Chavez in 2002, there were rumors linking the National Guard to the events (Villegas, 2002). Chavez subsequently pushed for the militarization of this law enforcement entity, transforming it into an auxiliary corps of the army to handle public order and domestic issues. Many of its original duties, such as border protection, customs, prison control, and maintaining domestic stability, were gradually transferred to the National Police, officially created in 2008 (Quinto Dia, Nr. 554, 2007).

The militarization of the National Guard under the Bolivarian political strategy had dual objectives: not only did it seek to bring this force under tighter control due to perceived autonomy, but it also aimed to integrate it within the military command to handle internal insurrections. This progressive militarization of the National Guard started in 2007 when it was declared as another military branch, performing both military and police duties (Ministerio del Poder Popular para la Comunicación y la Información, 2007, 159). Throughout the Chavez and Maduro administrations, the National Guard was frequently deployed to quell protests and riots (*Guarimbas*), utilizing tactics and equipment typically

reserved for the Venezuelan Army when dealing with unarmed citizens opposing the government (Vasquez, 2021).

In contrast, Colombia's National Police underwent a long-standing process of militarization primarily driven by the internal armed conflict. This shift began in the fifties when the National Police, responsible for public security in urban areas, was placed under the Ministry of War, later renamed the Ministry of Defense. Confronting the insurgent threat necessitated significant militarization, evident not only in the equipment, such as assault rifles and military ranks, but also in their olive-green uniforms, closely resembling those worn by the army in some countries. During the anti-drug efforts in the nineties, the National Police received light artillery like 81 mm mortars and lightweight attack helicopters (Rodriguez, 2018). One of the most controversial and highly militarized units within the National Police was the ESMAD (Mobile Anti-Disturbances Squadron), established in 1999 to handle riots, which later became a source of considerable controversy.

With Uribe assuming power, the integration of the Colombian Army and National Police deepened under a military structure. However, the roles of each branch were distinct in addressing the challenges posed by the Democratic Security strategy. While the army focused on defeating left-wing guerrillas, the police took charge of re-establishing a presence in towns reclaimed from these illegal groups. Given the risk of counteroffensives, the police often adopted a pronounced military approach, performing as an occupation force. In these areas, they engaged with the population and conducted checkpoints, surveillance activities, and patrols similar to those carried out by the army (Revista Cambio, Nr. 531, 2003). This close collaboration sometimes resulted in the police committing abuses in remote regions, frequently escaping the attention of civil society.

The actions of the Police, particularly units like the ESMAD, in the capital cities, mainly during Uribe's government in Colombia, and their highly militarized and repressive responses to protests against policies such as the free trade agreement with the United States, were marked by a significant level of abuse. According to CINEP, a prestigious independent think tank, the Police's mistreatment of protesters reached an unprecedented level during that period, including instances of mutilation, loss of eyes, and even fatalities among participants (CINEP, 2009a).

Both the National Guard in Venezuela and the National Police in Colombia were subjected to military power authorities, essentially functioning more as military forces than civilian law enforcement corps. In Venezuela, due to the perceived autonomy of the National Guard, it became a potential threat to the regime. Consequently, it was militarized, subordinated to military command, and progressively relieved of certain duties to ensure complete control. Despite this, it was still employed to suppress riots and urban security activities. In Colombia, the National Police played a crucial role in maintaining the neoliberal project, solidifying state presence, primarily through repression. In both countries, militarized law enforcement was deployed within the aura of civilian militarism, tasked with confronting social movements and protests using force deemed legitimate for ensuring the survival of the state and the political strategies of incumbents. While controversial, this deepening militarization of law enforcement aimed to enhance state capacity in unconventional ways according to contemporary standards, particularly in Venezuela, where it was primarily intended to safeguard the political strategy and regime. In both cases, the promotion and use of a "warrior mentality" within these law enforcement agencies targeted unarmed citizens, often protesting against the incumbents' policies. Thus, the militarism led by civilians was more directed toward the domestic front, serving as a by-product of the establishment or extension of an

economic model rather than geopolitical competition. This militarization had implications in the democratic quality in both countries, as law enforcement acted as a source of infrastructural and despotic power, playing a critical role in consolidating not only state capacity but also the political strategies of incumbents.

### **5.5. Militarism Facing the International Arena: Militaristic Diplomacy**

As previously mentioned, the context of a new Cold War favored both Colombia and Venezuela. Much of the international behavior, particularly during the peak of Bolivarian and Democratic security, was influenced by political strategies and the domestic realm more than challenges or disputes in the international arena. While protecting sovereignty and territorial integrity was deemed important, it was never genuinely threatened by external forces. Disputes and differences between political projects were confined to mutual accusations by each president regarding the support and interference in the domestic arena of the other country, rooted in their respective political ideologies.

In Colombia, both Uribe and Santos consistently accused Chavez of supporting and protecting left-wing guerrillas in Venezuela. Conversely, in Venezuela, Chavez and later Maduro primarily accused Uribe and Santos of supporting the Venezuelan opposition and conspiring against their country and the Bolivarian political strategy. This discursive confrontation played out through public speeches and mass media.

In some respects, international behavior was framed within the traditions and shared identities of both countries. However, in the case of Venezuela, this international political behavior was more active, especially during Chavez's tenure. John Hobson, in examining Mann's contributions, highlighted the omission in this author's theoretical perspective concerning a comprehensive approach to understanding states' international behavior. Although Mann acknowledged the intertwined relationship between domestic and

international behavior, Hobson argued that constructivism could fill this gap, a viewpoint echoed in this dissertation (Hobson, 2006; Hobson, 2000).

To safeguard their political projects and objectives, leaders in Venezuela and Colombia strategically projected them onto the international stage. Their aim was twofold: first, to advocate for their perspectives, and second, to showcase their achievements internationally. Military elements played a pivotal role, proving invaluable in securing allies and demonstrating the capability to protect their sovereignty, primarily through coercion.

In this context, Hobson suggests that examining the domestic identities that framed the incumbents' performance is crucial. Analyzing how domestic norms and moral purposes are internationalized becomes imperative in governing international political life, subsequently influencing states and their identities (Hobson, 2006, 160). This perspective aligns with the earlier notion I presented regarding how political ideologies shape a worldview and, consequently, influence international behavior. Hobson further complements this perspective by introducing the idea that states' interests, under the control of incumbents, are "informed by their identities, and their identities are shaped by the normative and social environment within which they reside. Such identities are constructed through what might be called 'statecraft' and 'socialcraft'" (Hobson, 2006, 160).

Hence, political ideologies coexist with shared identities, shaping the conduct of each political strategy and incumbent in the international arena. This is evident in the civilian-militarist nature of these political strategies, as well as the sense of brotherhood and shared identity between the two countries. Notably, leaders such as Chavez and Uribe garnered substantial domestic political support, affording them flexibility in their international actions. This support continued with Santos in Colombia, who secured a similar leeway to garner international support for the peace agreement with the FARC.

Among these incumbents, Chavez emerged as the most popular, gaining international recognition as the leader of an anti-United States coalition. To consolidate the Bolivarian political strategy domestically, Chavez advocated for a "new international geopolitics," as he termed it, one independent from the United States and closely aligned with cooperative projects in the Americas, particularly the Bolivarian Alliance for the Peoples of Our America (ALBA), established in 2004. ALBA aimed primarily to form an economic coalition against free trade agreements with the United States (República Bolivariana de Venezuela, 2007, 45). In this international projection, Venezuela's military power played a pivotal role, not only safeguarding the country's sovereignty but also facilitating military cooperation with nations like Cuba, Nicaragua, and Ecuador (República Bolivariana de Venezuela, 2001, 155). In various international forums, such as the United Nations General Assembly, both Chavez and Maduro sought to showcase the benefits of the Bolivarian political strategy. They emphasized its capacity to construct an alternative model of democracy and advocate for international causes, impacting global peace, including issues like the invasion of Afghanistan, the economic blockade of Cuba, and the recognition of a Palestinian state by the international community.

Militaristic diplomacy, particularly with Cuba, was a focal point. Carlos Romero noted that between 1999 and 2008, military cooperation involved humanitarian aid and seven visits by Venezuelan military personnel to Cuba, with 250 active-duty members in 2007 and 270 in 2008 (Romero, 2009). This collaboration aimed not only to exchange Cuban expertise for repelling potential military insurrections but also to establish a first line of defense against potential actions by the United States challenging Venezuela and its political strategy.

Chavez's militaristic diplomacy extended to Nicaragua and Ecuador, countries with similar political ideological trends under leaders such as Daniel Ortega and Rafael Correa. Chavez

implemented various measures to foster political and military cooperation with nations sharing his political ideology. According to Edmundo Gonzalez, Chavez's foreign policy incorporated a military component to highlight the achievements of his political strategy on the international stage (González, 2006).

In Colombia, during the tenures of Uribe and Santos, democratic security served as the cornerstone of diplomatic efforts. Unlike Venezuela, this approach underwent a transition from a militaristic perspective to a diplomacy centered on peace, while still acknowledging the importance of the militarist component. The focus shifted towards showcasing the benefits of applying coercion to dismantle and push illegal armed groups, primarily the FARC, toward a peace agreement.

Under the umbrella of the United States' war on terror, Uribe directed diplomatic efforts to condemn the behavior of illegal groups in Colombia and the detrimental influence of drug trafficking. Simultaneously, efforts were made to garner allies for this cause. An official document on foreign policy underscores this approach:

Our international policy is firmly articulated with our entire domestic policy; the efforts and sacrifices of the Government and the Colombian people require the firm and determined commitment of the international community. Colombia asks the world for solid support to defeat terrorism while showing solidarity with the global fight against terrorism in all its forms and manifestations, wherever it may occur. (Ministerio de Relaciones Exteriores, 2004, 7).

According to expert Diana Rojas, Colombian foreign policy served as an extension of the Democratic Security strategy, primarily aiming to internationalize the Colombian conflict. This approach not only sought to preclude support for left-wing guerrillas but also aimed to attract foreign cooperation in the military domain (Rojas, 2006). Similar to Chavez in Venezuela, Uribe wielded significant influence based on domestic support to shape the country's foreign policy. A central commitment was a robust alignment with the United

States. In contrast to the Venezuelan case, both Uribe and later Santos strengthened diplomatic ties with the United States. Uribe took steps to assure a free trade agreement with this country, ultimately ratified during Santos's presidency (Villareal, 2014).

During Uribe's tenure, the primary diplomatic focus was on enhancing ties with Washington. Simultaneously, in international forums like the United Nations General Assembly and the Organization of American States, efforts were made to convince the global community of the benefits of the Democratic Security strategy, emphasizing its capacity to strengthen the Colombian state and seeking assistance in combating illegal armed groups (El Espectador, 2008). Successful military operations against these groups bolstered the international standing of the Colombian military.

The diplomatic links with the United States reached a pinnacle during Santos's government. In 2012, a military agreement known as the *Action Plan on Regional Security Cooperation* was signed with President Barack Obama. This agreement involved the engagement of Colombian military power to train personnel not only in Latin America but also globally, including countries like Iraq and Afghanistan. The objective was to "export Colombian security success" (Beittel, 2021, 26-27). According to expert Viana Trindade, Colombian military strategies became sought after worldwide as an effective solution for countries facing similar domestic challenges (2022, 224-227). This aspect of militaristic diplomacy aligned closely with the alliance with the United States.

This military expertise also played a crucial role in the shift towards diplomacy for peace during Santos's tenure, as Colombia extended its engagement to the broader Latin American context (Sánchez and Campos, 2019).

This militaristic diplomacy aimed to safeguard the domestic initiatives of each incumbent. In the case of Venezuela, it actively sought to dissuade any potential action from the United

States against the political regime, although it never posed a credible military threat to the country. As asserted by Mann (2012, 70), the ultimate goal of diplomacy is to make friends and isolate enemies. In both Venezuela and Colombia, foreign policy functioned in alignment with domestic political strategies. Presidents, particularly Chavez and Uribe, and to a lesser extent, Maduro and Santos, became the international faces of this diplomacy, characterized by a militaristic component focused on safeguarding their respective domestic projects.

While the intensity of this approach varied, particularly with Maduro prioritizing the preservation of his political power and diminishing Venezuela's influence internationally, Santos shifted the orientation of the democratic security strategy to garner allies for the peace process with the FARC. However, the Bolivarian political strategy exerted a far greater influence on the international stage than the Democratic Security strategy. In both cases, local traditions and identities, particularly the approach to the Latin American community in terms of proximity or distance from the United States, played a pivotal role in shaping the outcomes of incumbents' political strategies.

#### **5.6. Civilian Control of Civilian Militarism: Dealing with Interstate War**

The potential consequence of militarism, especially the outbreak of an interstate war, poses a severe threat to the basic attributes of the modern state, particularly sovereignty and territorial integrity. This risk involves the possibility of losing parts of a country's territory or experiencing alterations to its political regime and social norms in the event of defeat. Mann highlights the significant impact of military power and involvement in war, suggesting that these factors can bring about sudden and profound changes with far-reaching consequences for both the country in question and the broader international system. Militarism, in this context, is fueled by geopolitical competition within the multi-state system, where warfare

has historically been a recurring and often rational element (Mann, 2012, 69-70 & 84-87; Mann, 1984b, 144).

In the Latin American context explored throughout this chapter, civilian militarism appears to have emerged from a unique combination of domestic factors influenced by changes in economic power brought about by neoliberalism. The consolidation of this phenomenon was primarily oriented toward ensuring the survival of the political strategies led by incumbents, most notably Uribe, Chavez, and Maduro. Despite the exacerbation of rivalries between these countries based on differing political ideologies, these factors alone were insufficient to determine their behavior in the international arena. The actions of these leaders were also shaped by regional traditions, norms, and identity.

In the early 21st century, tensions between political strategies of Colombia and Venezuela not only stemmed from divergent political ideologies but were also fueled by mutual recriminations of domestic interference. The external consequences of the conflict in Colombia, and accusations that Uribe and Colombia were acting on behalf of the United States to undermine or defeat the Bolivarian political strategy heightened these tensions.

As neighboring countries, Colombia and Venezuela share deep historical, social, economic, and cultural ties. However, in the 21<sup>st</sup> century, the differences in their political ideologies and strategies exacerbated the rivalry between them, bringing them close to the brink of an interstate war. The presence of FARC members in Venezuela and public declarations by Chavez criticizing Uribe's approach to Colombia's internal conflict contributed to heightened tensions (Rangel, 2003, 4; *Revista Cambio*, Nr. 508, 2003, 11-15; *Revista Cambio*, Nr. 752, 2007, 24-25).

The situation reached a critical point when Chavez accused Uribe of plotting to invade Venezuela, alleging collusion with the North American empire. Chavez's statement escalated

tensions significantly, especially after the Colombian Military conducted an air attack on a FARC encampment in Ecuadorian territory in 2008. This event signaled to Chavez that Colombia might be preparing to invade Venezuela, prompting him to support Ecuador's claims against Colombia for violating its territory. Chavez mobilized troops to the Colombian border, creating an extremely tense situation between two countries (Revista Cambio Nr. 766, 2008, 18-24; Barraez, 2008, 22).

The resolution of this warlike tension is a crucial aspect of the argument presented in this dissertation. The conventional explanation for the absence of interstate wars in Latin America in recent years often relies on the democratic peace perspective, suggesting that countries with democratic regimes, even if fragile, do not engage in conflicts with each other (Hobson, 2011; Kacowicz, 1998). Empirical evidence from Latin America supports the idea that democratization has contributed to a reduction in the occurrence of interstate wars in the region (Thies, 2005, 456). However, critics argue that this perspective overlooks various aspects, such as the definition of peace and the presence of democracies with authoritarian tendencies (Kurtenbach, 2019; Franchi, T., Migon, E., & Villarreal, R. 2017). The explanations for why tensions between some countries in Latin America do not escalate into interstate wars remain incomplete. Some suggest that the *Pax Americana* has played a role in inhibiting the likelihood of war between these countries (Cohrs, 2018). However, the United States' influence, while significant, was not enough to prevent the outbreak of war due to its declining influence in recent years. Additionally, the argument about democratic peace might be less effective in analyzing the de-escalation of military tensions between Colombia and Venezuela, given the authoritarian traits associated with civilian militarism, mainly during Maduro's tenure. Moreover, the very nature of civilian militarism could have

potentially fueled an interstate war with its militaristic discourse, serving the interests of each incumbent in consolidating their political strategies domestically.

In understanding why interstate wars did not occur in Latin America, especially in the context of heightened bilateral tension between Colombia and Venezuela, despite the promotion of militaristic values and preparedness for war by civilian authorities—referred to as civilian militarism—a plausible explanation lies in the shared identity between these countries. As previously highlighted, Mann's perspective aligns closely with the constructivist approach, as evidenced by the following extract:

Statesmen had social identities, especially of class and religious community, whose norms helped define conceptions of interests and morality. Thus diplomacy and geopolitics were rule-governed. Some rules defined what reasonable national interests were and were shared by statesmen across the civilization. Others added normative understandings among kin-related aristocrats, among Catholics, among "Europeans," "Westerners," even occasionally among "human beings." (Mann, 2012, 69)

The constructivist school emphasizes the significance of identity in shaping the behavior of actors in the international arena, a perspective closely aligned with Mann's approach. While identity can be understood from various angles within this school (Vucetic, 2017), for the purpose of this discussion, it will be considered as shared values, traditions, religion, language, ethnicity, and historical background constantly reinforced among a group of countries. In the context of Latin America, identity is often referred to as *pueblos hermanos*, denoting a shared identity among different countries across the region, including Brazil, despite its official language being Portuguese. The concept of Latin American brothers and sisters is commonly invoked in political and daily discourse.

Both political strategies under Uribe and Chavez were framed within this shared identity perspective. Chavez, for instance, believed that "The cohesion of Latin American and Caribbean countries, through the consolidation and implementation of their common identity,

will become the ideal mechanism to expand the opportunities for growth and development in the region" (República Bolivariana de Venezuela, 2001, 156). Similarly, Uribe's foreign policy emphasized "The strengthening of ties with Latin America and the Caribbean, with an emphasis on relationships with neighboring countries" (Ministerio de Relaciones Exteriores, 2004, 20). Despite attempts by both incumbents to foster alliances with countries sharing a similar political ideological perspective, Latin American identity played a critical role in de-escalating the warlike atmosphere during bilateral crises.

During the height of tensions between Venezuela and Ecuador on one side and Colombia on the other, Latin American identity emerged as a contributing factor to defusing the situation. Despite aggressive rhetoric, with Chavez mobilizing military forces to the Colombian border, and Uribe refraining from openly mobilizing troops (Barraez, Sebastiana, 2008, 22), the crisis was peacefully resolved during a Rio Group forum in Santo Domingo in March 2008. The Latin American presidents, led by Dominican Republic's President Leonel Fernández, invoked the idea of Latin American sisterhood (*hermandad*)<sup>10</sup>, urging a pacific resolution to the crisis (Reuters, 2008). This incident underscores the role of shared identity in contributing to regional stability despite critical circumstances.

Between 2008 and 2010, tensions persisted between Venezuela and Colombia, marked by mutual recriminations and accusations of intervention, further fueled by actions supported by strategic allies like Russia and the United States. Militarist discourses rooted in political ideology differences reached dangerous levels during this period. Unexpectedly, civil society played a crucial role in both countries, urging a de-escalation of tensions and advocating for

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<sup>10</sup> Curiously, in Spanish, the word "hermandad" is feminine.

peace. Yagil Levy suggests that while democratic countries may have control over the military by civilian authorities, it is sometimes challenging to rein in the militarism of civilian leaders who advocate for war and conflict preparation (Levy, 2011).

Latin American sisterhood became a key theme in mass media narratives, contributing significantly to preventing an escalation to war. Venezuelan journalist Rafael Polea highlighted the disapproval of the Venezuelan people toward warlike discourse, stating, "Waging war against Colombia is an old and cherished fantasy that Venezuelans will never be able to carry out. Colombians simply will not allow it" (Poleo, 2009, 4). Similarly, a Colombian magazine reflected on the absurdity of a potential war, emphasizing confusion among Colombians about how such a situation could be probable (Revista Semana, Nr. 1445, 2010, 20). Unlike Chavez, Uribe exercised caution and primarily directed his militarism toward the domestic realm, civil society's manifestation through mass media played a crucial role in exerting some control over militaristic tendencies. Civilian militarism, while originating and consolidating on the domestic front, had the potential to unfold into an international dispute when out of control, even though its primary origin was not rooted in the geopolitical competition between these countries.

## **5.7. Conclusion**

In this chapter, the aim was to illustrate that the emergence and consolidation of civilian militarism within the Bolivarian and Democratic Security strategies were primarily responses to domestic factors and objectives. This stands in contrast to the notion that militarism could have been propelled by international competition between Colombia and Venezuela or the projection of rivalries between the United States and Russia in the region. Simultaneously, a comparative approach was employed, analyzing both countries, and emphasis was placed on examining the interaction between them. While international competition played a role in

pushing the consolidation of civilian militarism, it was not the determining factor. This challenges Mann's perspective on the critical impact of international rivalries in the emergence of militarism, known as geopolitical militarism. Civilian militarism, in this context, mainly responds to domestic needs and factors, providing a conceptual alternative to understanding how political leaders in power can utilize military power within a democratic and legal structure to project their worldview both domestically and internationally.

Coercion, as one of the core state capacities, played a critical role in preserving and consolidating state presence, as well as empowering these political strategies in the domestic scenario. Despite the traditional notion that the arms race between Colombia and Venezuela was a by-product of international rivalry, the primary goal was to upgrade military hardware for domestic use and to deter international attempts to influence domestic politics, although it also had the potential for use in case of an international dispute. The projection of rivalry in the context of a new Cold War served as a shield for incumbents' political strategies, but their international behavior alone is insufficient to prove that militarism was geared towards preparing for war against neighboring countries at least until the period studied.

Alliances, formed within the context of international rivalries, provided protection for domestic political projects in Colombia and Venezuela. The militarization of law enforcement, represented by the National Guard in Venezuela and the National Police in Colombia, was intensified under these political strategies, serving not only as state coercive apparatus but also as repressive forces against domestic political opponents and the civil population. They functioned as dual sources of infrastructural and despotic power in the hands of democratically elected leaders.

While the international front was significant, it was not determinative for the consolidation of civilian militarism. The risk of tensions escalating between these neighboring countries was always present due to their warlike stances. However, considering the constructivist school of thought, I suggest that the shared Latin American identity was stronger than political ideology rivalries in preventing warlike escalation between both countries. This was made possible through the actions of civil society and regional Latin American initiatives that successfully asserted civilian control over civilian militarism. Thus, the manifestations of this militarism are more oriented towards the domestic front within the framework of democratic regimes to enhance state capacity and, by extension, the political strategies of incumbents. These manifestations, although potentially risky in case of escalating into an international war in a different context, were arguably harmful to democratic regimes, as I will explore in the next chapter.

## CHAPTER 6 CIVILIAN MILITARISM AND DEMOCRACY

### 6.1 Introduction

The interplay between political and military power has spurred the emergence and consolidation of civilian militarism in Colombia and Venezuela. This phenomenon is situated within the structural framework of fragile democratic regimes, propelled by economic contingencies that prompted shifts in the power correlations of these countries. Here, human agency, predominantly steered by incumbents, played a crucial role as they pursued their political strategies to tackle the challenges confronted by each country in the first decades of the 21<sup>st</sup> century. These countries witnessed the promotion of civilian militarism, advocating for war preparedness and the glorification of military power as the linchpin in their political strategies. This included the utilization of the military in non-military activities, along with a series of militarized actions, practices, and procedures that had distinct impacts on society in both countries.

Democracy is a by-product of the increased spread of infrastructural power throughout the social realm, where civil society began to gain influence over the state's rulers (Mann, 2002, 3-4). However, due to weak state capacity in Latin America, military power played a critical role in Colombia and Venezuela in recent times to enhance this, albeit in a *non-sanctum* combination. Military power served as a source of infrastructural and despotic power, significantly influencing the quality of democracy.

The literature has highlighted the detrimental effects of militarism, in any of its manifestations, on democracy. Civilian militarism, despite its facade of legitimacy and legality supported by popular support at the polls, was no exception. The presence of militarism and militarization eroded the quality of democracy, as the ability to control the military was drastically reduced. Incumbents often resort to military coercion to suppress

opposition and social unrest, leading to an increase in human rights violations by the state. Thus, society tended to increasingly rely on coercive solutions rather than addressing underlying structural problems (Kuehn & Levy, 2020, 7-8). This pursuit of order and the quest for extreme solutions orchestrated by incumbents contribute to the deterioration of democratic quality, mainly in Venezuela. Similarly, quantitative research has proved the correlation between the rise of militaristic trends and a decline in the quality of democracy, marked by the progressive appearance of authoritarian traits within society and political regimes (Zafirovski, 2020, 181).

In the context of civilian militarism, as previously suggested, all democratic mechanisms unfold to demonstrate, to both domestic and international public opinion, that actions were executed following legitimate and legal forms, in accordance with democratic and constitutional standards. However, these actions often employed strategies and practices that, in many cases, lean towards authoritarianism. Although such tendencies were uncovered under the law and better contained in Colombia, thanks to democratic checks and balances, civilian leadership, civil society action, and the professionalism of the military power, mainly during Uribe's tenure. Meanwhile, in Venezuela, the radical political strategy successfully seized control of numerous democratic institutions, a development validated by significant popular support and the active involvement of incumbents, ultimately leading to a transition to an authoritarian government.<sup>11</sup>

Within the dynamics of civilian militarism, incumbents deploy a set of militaristic actions and procedures that influence the attitudes and behaviors of the population beyond the barracks, supported by military power serving as a backbone. This included the use of

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<sup>11</sup> See the Varieties of Democracy Index, Dataset 2022, available at <https://v-dem.net/data/>. This is one of the most comprehensive indexes to measure quantitatively the deepening or deterioration of democracy.

military structure to increase state capacity, primarily via coercion, but also through other means, especially evident in Venezuela.

This chapter aims to comparatively explore some of these actions and procedures, examining how, in some cases, they were planned to consolidate or supplant the roles of civilian state agencies with military power. This involves military power assuming a role as a source of despotic or infrastructural power, impacting activities that are traditionally the purview of civilian agencies. In alignment with incumbents' political strategies, military power operates both legally and, in some cases, in consonance with illegal actors, committing excesses justified under these political strategies.

Civilian leaders, aimed to enhance state capacity as articulated in their long-term political strategies, but harmed democracy by imposing a militarization of certain activities. This manifests in the pervasive presence of the military across these countries, engaging in non-military duties in some cases, utilizing shadow groups to achieve political goals that legal military forces could not fulfill, and directly repressing civil society. In this context, this chapter seeks to demonstrate that the political strategy of these incumbents, via civilian militarism, gains momentum to remilitarize the state and increase state capacity, ultimately harming democracy with extreme abuses. These excesses were accepted by a portion of the population due to actions and practices deployed to persuade them, framed under a legal component but driven by a militaristic logic, and in other cases, under despotic forms that instill fear and terror, serving incumbents' political goals.

In doing so, this chapter aims to illustrate how civilian militarism, despite variations in its procedures, functioned cohesively to consolidate political strategies in the domestic realm. These utilized military power within the framework of the state and political power to penetrate the social realm. This analysis seeks to address a gap in the examination of

militarism, particularly related to Mann's approach, which has faced criticism for its lack of micro-level analysis perspective (Breuilly et al., 2006).

Firstly, I will examine military units that were established to align with the core of the incumbent's political strategies. These units served the dual purpose of fulfilling political goals while also reinforcing the dissemination of civilian militarism among the ordinary people. Secondly, I will scrutinize shadow military units that, despite not being directly incorporated into the state structure, acted in consonance with political strategies and executed illegal tasks under the logic of civilian militarism.

Thirdly, I will explore practices that illustrate how military power was utilized as a combined source of infrastructural and despotic power. This articulation with civilian militarism created an environment for military power to act detrimentally, inducing fear and terror among ordinary people. This is exemplified by killings committed by the Colombian Army and the management of supermarkets by the Venezuelan military.

Fourthly, I will analyze how civilian militarism incentivized repression through the utilization of military power and shadow forces, aligning with overarching political strategies and impacting democratic principles. Finally, I will draw conclusions about how the entrenchment of civilian militarism within political strategies impacted democracy in both Colombia and Venezuela.

## **6.2. Spreading Civilian Militarism: Bolivarian Militias and Soldiers of my Town.**

Michel Randle underscores one of the less-explored facets of militarism: its inclination to curtail civilian liberties and freedoms through repression. This phenomenon is not solely a result of the military's ability to employ coercion for subjugation; rather, individuals subjected to military service also face pressure or persuasion to enlist. This leads to the adoption of military logic, encompassing subordination, a restriction on their normal lives,

and exposure to risky situations (Randle, 1981, 68-69). The examination of conscription, joining the military, and how individuals are socialized to serve in this institution has waned in the global north due to the transition to all-volunteer forces many years ago (Moskos, 2010). However, in the global south, particularly in countries grappling with internal armed conflicts, this topic remains pertinent, albeit lacking popularity among academics (Rodriguez, 2008). Recent geopolitical disputes have revived interest in studying this subject, driven by concerns about global war and the challenge of attracting potential soldiers (Crombe & Nagl, 2023).

In Colombia and Venezuela, military service was compulsory but varied significantly in its characteristics during the period under study. In Colombia, mandatory service was necessitated by the need for personnel to confront the internal armed conflict. In Venezuela, although it was also declared mandatory under the Constitution of 1999, positions were predominantly filled by volunteers. Military service serves as a potent instrument to shape and standardize a set of beliefs and identities within the population. This influence persists, as individuals, even after their temporary service, remain in contact with their communities, becoming disseminators of ideas learned during service, including the political worldview embedded in military power and the closest political perspectives (Rodriguez, 2008). Fidel Molina asserts that military service is instrumental in disseminating the idea that military power can effectively address various challenges confronted by a society, laying the groundwork for militarism (Molina, 1996, 22-24). Similarly, scholarship has demonstrated that serving in the military for a duration significantly impacts personal beliefs and personality, making citizens more susceptible to acquiring a militaristic mindset (Ertola, López, Rossi, & Vazquez, 2022).

In the analysis of how civilian militarism permeated these countries and reached ordinary people, two cases stand out: the Bolivarian militias and the "Soldier of My Town." These cases offer detailed insights into how Bolivarian and Democratic Security strategies organized specific services to achieve their political goals and serve to analyze how these became disseminators of civilian militarism in certain social spheres.

The Bolivarian Militias originated in 2005 when Chavez established the Circumscription of Military Reserves (*Circunscripcion militar de reservistas*), which included the creation of a command for military mobilization. The goal was to transform any citizen into a militia person with the capability to defend the country's sovereignty from domestic and international threats. This reserve corps incorporated regular military training, and it was estimated that at least 1.5 million people would be involved in this initiative. However, concerns were raised among democratic forces, who believed that their purpose was to serve as Chavez's personal guard, thereby weakening the professional military forces (Semanao Quinto Día, 2005, Nr. 458, 10).

In 2009, these reserves were rebranded under the name of Bolivarian Militia, considered the sector of the population that had received the highest Bolivarian indoctrination. This indoctrination not only encompassed military training but also established strong foundations in line with the Bolivarian political strategy (Revista Zeta, 2005, Nr. 1524, 15). The militias even included civilian servants under the "*Contrato Rondon*" program, aiming to militarize and subordinate governmental employees to Bolivarian guidelines, preventing the creation of unions that protested against the regime (Revista Zeta, 2007, Nr. 1624, 54-55).

This military corps was not regarded as a national militia but rather as a militia directly attached to Chavez's political strategy. From 2009 onward, all citizens between 16 to 60 years old were required to register in the national military system to undergo regular military

training. In 2010, all militias received olive green uniforms and weapons that could be kept in their homes, further enhancing the link between the Venezuelan military and the civilian population (Revista Zeta, 2010, Nr. 1750, 30-36). This marked the pinnacle of the militarization of ordinary citizens, encompassing individuals of various age groups.

In 2014, shortly after assuming political power and following Chavez's death, Maduro enacted a new law for the Bolivarian Armed Forces. This legislation specified that militias became a subsidiary force of military power under direct military control, with all branches responding directly to political power. Maduro recognized that independent militias were no longer necessary, and they proved useful for political reasons. The militias, comprised of civilians engaged in common and ordinary activities, became a source of human intelligence, particularly in urban areas.

The Soldiers of My Town program was established by Uribe in 2002, drawing legal reference from an existing type of soldier authorized by Law 48 of 1993, known as the peasant soldier (*Soldado campesino*). Initially designed to prevent rural households from losing a productive member of their communities, the program underwent a transformation under its new name. The main purpose was "to create a protective, defensive capacity in remote communities previously unserved by military forces" through these soldiers (Ministry of Defense, 2005). According to specialist Alfredo Rangel, the primary objective was to curb the advance of illegal armed groups in regions outside of state control (El Tiempo, August 30, 2002). This program aimed to leverage the soldiers' knowledge of their regions and communities, acting as a deterrent and defensive force rather than offensive troops. Institutional information stated that "By serving in their hometowns, My Town Soldiers have intrinsic knowledge of the areas where they'll serve. This knowledge allows them to provide more effective protection to the population against incursions and attacks by terrorist groups" (Ministry of Defense, 2005).

The force comprised approximately 15,000 soldiers serving in the most remote towns of Colombia, intending to strengthen the links between the Colombian military and the civilian population. The program played a critical role in the Democratic Security strategy and the construction of connections with remote communities, as emphasized in Uribe's speech in 2007: "This commits them [the soldiers of my town] further, because there they have to protect their loved ones, lifelong friendships. And it also commits the community more to them because it's the same community as their family" (Uribe, 2007).

Both the Soldiers of My Town and Bolivarian Militias sought to enlist individuals with close ties to their communities and serve as the flagship of their respective political strategies. Military sociology has emphasized the powerful impact of military service in shaping ideas and serving as a means to disseminate them across societies (Moskos, 1969; Janowitz & Little, 1974). There appears to be a causal relationship in both cases. Incumbents, in this instance, Chavez-Maduro and Uribe, aimed to create a military corps that, despite being part of the military structure and logic, was more loyal to them and had direct contact with the population. This strengthened the relationship between ordinary people in communities and the military power under the leadership of incumbents' political strategies.

One could hypothesize that this had at least two benefits for the political strategies within the context of civilian militarism. Firstly, due to their contact with ordinary people, the military and incumbents could spread their beliefs and highlight the benefits of these political strategies. Secondly, these forces acted as a first line of defense and also an accessible source of human intelligence to detect any movement attempting to destabilize the state's capacity or political strategies (Rodriguez, 2013). While the first case might be considered beneficial for the state's survival, it was detrimental to democracy because it created and trained military

groups inclined to defend these political projects, equipped with military training and weaponry.

Throughout these military services, militarism led by civilian leaders reached and permeated low-income and isolated areas of these countries. In Venezuela, the focus was on urban and central areas, including a presence in poor neighborhoods, while in Colombia, it entailed a presence in remote towns often surrounded by hostile forces. Legal mechanisms were employed in both cases to establish and deploy these units. However, in Venezuela, the instructions included an alignment with the Bolivarian political strategy, while in Colombia, despite being framed within the political strategy, the emphasis was on a role as the state's infrastructural power, aligned with the iron-fist perspective of the Democratic Security strategy.

These services likely nurtured loyalty and beliefs among their members regarding the political strategies of the incumbents. Primary sources indicated that both Bolivarian militias and the Soldiers of My Town were consolidated under civilian militarism, claiming the need to defend the state from threats that incumbents deemed critical for its existence and survival, framed under their political strategies. This had profound consequences for individuals and their communities. Military sociology recognizes that military corps create cohesion based on training, common cause, socialization, and shared experiences, not only during wartime but also in peacetime (Henderson, 1985, 9-15). This socialization and shared experience have a powerful long-term impact, instilling a militaristic mindset within civil society (Ertola, López, Rossi, & Vazquez, 2022; Basham, 2011, 186). The activities and ethos of being members of a military organization are likely highly respected by the community and serve as a source of reference for them, as highlighted by Gaston Bouthoul's observations on the high prestige that the military holds within almost any society (1971, 9-13).

However, the members of these services did not necessarily demand an enhancement of democracy; their attitude was likely passive. Unlike cases of interstate wars where combatants face imminent risks of losing their lives under foreign fire, which often leads to demands for enhancing political rights and civilian freedoms, this was not the case here. Although in the context of Colombia, such demands could have been more probable due to the internal armed conflict, they never materialized. Consequently, these military services can be viewed as highly useful for political strategies and the dissemination of militaristic worldviews across these societies. These corps represented both a cause and consequence of civilian militarism, significantly impacting democracy. While their creation and consolidation were justified under a legal framework, their existence simultaneously contested the impartiality and legality of such units, thereby disrupting the democratic balance in favor of incumbents' political strategies mainly in Venezuela.

### **6.3. Shadow Forces: *Colectivos* and *Águilas Negras***

In the context of civilian militarism, both incumbents and political strategies favor the consolidation or creation of illegal armed groups. Although these groups are not officially part of the state's military structure, they align with political strategies under a militaristic logic, engaging in illegal activities such as crimes, intimidation, extortion, and blackmail. Uğur Üngör, in a well-founded book, generally categorizes these kinds of groups as paramilitaries. However, since the main goal is to use them for comparison and considering that, in Colombia, paramilitaries are involved in significant crimes against humanity (Nussio, 2011), this concept creates a conflict of interests comparatively speaking, due to a substantial difference between Colombia and Venezuela. Therefore, I prefer to use the concept of “shadow forces,” aligning with the ideas of the same author, which facilitates the comparison without branding these erroneously.

Shadow forces are considered as "organizations that carry out violence" that cannot be openly conducted by state forces and may be "state-sponsored" or pro-government groups acting on behalf of the state but not openly belonging to it (Üngör, 2020, 6-9). In Venezuela, the so-called *colectivos* (Collectives) and in Colombia, the *Aguilas Negras* (The Black Eagles) fit into this category, gaining significant power under civilian militarism embedded in political strategies, particularly when these strategies matured in the domestic realm.

The *colectivos* originated from the "Bolivarian circles," which were community and study groups sponsored under the Bolivarian political strategy across the country, primarily in cities. These groups aimed to discuss ideas and devise strategies to implement the political strategy at the grassroots level, pursuing the consolidation of a participatory democracy. After the failed coup against Chavez in 2002, these groups became more influential due to their role in pressuring for Chavez's return to political power. Their influence increased, emphasizing their autonomy and popular character. Over time, these groups evolved into *colectivos*, viewed as gangs defending the incumbent's political strategy through various intimidating methods against opponents in daily life and during protests against Chavez's government and later during Maduro's tenure (Insight the Crime, 2018). Often acting with hoods and dressing in black, these gangs spread terror through kidnapping, blackmail, threats, beatings, and even killings of political opponents during protests. Although not officially proven to receive systemic support from political power, they bore arms and experienced exponential growth during the Maduro government, filling roles that the military refused to engage in, according to experts (Velasco, 2022). The *colectivos* combined violent activities with indoctrination across communities and were involved in both legal and illegal activities. In an interview for the BBC, a member of these collectives stated, "We are organizations that have been created as security measures to defend the government model, the people, and the

political figures" (Garcia, 2017). Thus, these shadow forces played a critical role in maintaining the Chavez and Maduro governments in political power, flourishing under civilian militarism in Venezuela and contributing to the transition to authoritarianism.

The *Aguilas Negras* (The Black Eagles) emerged as a mutation of paramilitary groups operating under the umbrella name of *Autodefensas Unidas de Colombia* (AUC) (United Self-defense Forces of Colombia). The AUC comprised various paramilitary groups active in Colombia between the late 1990s and the early 21<sup>st</sup> century, with the primary objective of combating left-wing guerrillas often in collusion with state security forces. Their actions included killing civilians accused of supporting these guerrillas and targeting social, political, student, and media leaders who publicly condemned the actions of landlords in remote regions together to injustices (Garcia-Peña, 2005). Uribe faced accusations of being linked to the paramilitary phenomenon due to his support for similar organizations while serving as the governor of the Department of Antioquia.

Upon assuming political power, Uribe sought to distance himself from these allegations to gain credibility. This involved intensifying military actions against the AUC and negotiating with them (Rangel, 2002b), especially as the U.S. Department of State declared the AUC a terrorist group in 2001. Thus, Uribe signed an agreement with the AUC in 2003, leading to the demobilization of 30,150 combatants by 2006 (Rodriguez, 2018b). However, despite negotiations and the extradition of many AUC leaders to the United States, a faction of former AUC combatants transformed into the *Aguilas Negras*. This group continued the same *modus operandi*, intensifying terror actions against members of civil society, human rights defenders, and anyone advocating for social justice, equality, or changes in the incumbent's political perspective.

An illustrative example is the death threat received by members of the Medellin Youth Network, an NGO working against the militarization of public safety and police brutality in low-income neighborhoods in Medellin (Colombia). In 2008, they received the following threat from the *Aguilas Negras*: “Death to anarchists disguised as pacifists, no more druggy concerts or communists, there are no more warnings” (Amnesty International, 2008). Thus, despite negotiations with the main paramilitary group in Colombia, civilian militarism facilitated the persistence of these shadow forces, sharing a similar creed with the incumbent's political strategy and being encouraged by the omission or hidden interests of political power to carry out the dirty work.

These shadow forces undertook roles and activities that regular and official forces were not authorized to carry out. Yet, to some extent, they contributed to the realization of the goals of the political strategies, mainly during the tenures of Uribe, Chavez, and Maduro. This represents a profound manifestation of civilian militarism embraced by the radical supporters of the incumbents and their strategies within civil society. These shadow forces of civilian militarism, in some respects, utilized military equipment, tactics, and similar uniforms regularly employed to create terror among ordinary people. Often, they included veterans who assisted in instilling the military culture of each country, encompassing elements such as change of command, formations, and actions in small units (Vucetic & Mabee, 2018, 102). These shadow forces operated in alignment with the goals of the political strategies studied here, although they often prioritized their own interests and undertook independent actions while benefiting from the civilian militaristic atmosphere, including engagement in activities linked to drug trafficking.

These forces fit into the long tradition of the "dirty war" in Latin America, particularly during the military dictatorships in the Southern Cone. Within this context, these shadow forces

became immersed in a process of militarization through interactions with veterans or contact with active members of the military power. Similarly, the *modus operandi* of these groups toward their victims implied a dual militarization of these shadow forces and the victims themselves. In a context of militarism led by the incumbents, the victims underwent how violence became normalized as a routine practice of intimidation by these groups acting as military entities (Macmillan, 2011, 63).

These shadow forces have been accurately identified as a form of militarism by Mann, termed "civil society militarism." This concept pertains to organized military violence employed by members of civil society who are not active-duty military personnel and are neither state-led nor state-supported (Mann, 1996, 235). While this concept aligns with the broader explanations of civilian militarism, the latest concept is distinct, emphasizing a holistic atmosphere of militarism sponsored by civilian authorities. Under democratic rules, these authorities encouraged and favored militarization in various social realms, sponsoring actions, tactics, and procedures that glorified war and prepared for it to achieve their political strategies.

Civilian militarism, therefore, facilitated the emergence or consolidation of shadow forces, encompassing members ranging from fanatics capable of executing extremist actions to opportunists. This phenomenon can be related to the origin and actions of other extremist groups that idealize discipline, oppose political dissent, and employ extreme violence to persuade opponents, acting in alignment with states such as fascist paramilitary groups. (Mann, 2004, 68-69). Civilian militarism passively encouraged these groups and the ideas of order and discipline associated with the glorification of the military. In this way, incumbents rarely condemned the illegal activities of these shadow forces, despite accusations

denouncing the links between these forces and the military in both countries (Semana, 2007, Nr. 1331, 44-45; Insight the Crime, 2018).

While these shadow forces assisted in achieving the primary goals of incumbents' political strategies, particularly in Venezuela and during Uribe's tenure, by exerting coercion through threats, targeted violence on communities, and selective killings, they undermined the state's monopoly on coercion. Simultaneously, they harmed democracy by intimidating the opposition and the broader civil society. In Colombia, extreme threats were common often resulting in the killing of social leaders, members of student organizations and unions, and individuals dissenting from the political strategy's worldview.

These shadow forces, masters of excesses and extreme violence throughout their military engagements, contributed to disciplining civil society and acted in harmony with the ideas of the incumbents or, at the very least, refrained from acting against them. Their actions negatively impacted fundamental freedoms and liberties established by democratic regimes, constituting a paradoxical situation where forces not openly related to state institutions exerted despotic power on behalf of incumbents' political strategies, and the state. Ironically, they assisted in building state capacity through coercion or sustaining the prevailing political regime. In both cases, civilian militarism, irrespective of the political leanings of incumbents or their specific strategies, played a role in the existence and recurrence of shadow forces. These groups, often supported by members of state agencies providing information or weapons, posed threats to political opponents, dissidents, or the civilian population to compel acceptance of the prevailing political strategy. Thus, both shadow forces significantly contributed to consolidating political strategies and achieving the attained economic models.

#### **6.4. Hunger and Death: Civilian Militarism as Infrastructural and Despotic Power**

Civilian militarism played a crucial role in the Bolivarian and Democratic security political strategies, as highlighted in the previous chapters. One of the most conspicuous aspects of this militarism in both Venezuela and Colombia was the significant influence of military power, not only in traditional duties but also in non-military activities. Despite engaging in classical duties, military institutions consistently displayed a militaristic disposition in their interactions with civil society. This dynamic not only benefited the incumbents but also shaped the relationship with ordinary people, fostering acceptance of both political strategies and the inherent militaristic nature, which, in some instances, manifested in extreme actions, especially in Colombia. Consequently, within the framework of civilian militarism, military power in Colombia and Venezuela assumed a dual role — serving as a source of infrastructural and despotic power. This dual role was instrumental in implementing political strategies and goals while simultaneously instilling fear and despotism in the social realm through a series of harsh and unjust actions carried out by the military, justified by the political power's strategies.

In this context, military power, articulated within civilian militarism, had the latitude to employ a militaristic logic beyond barracks. This encompassed the utilization of abusive coercion by the Colombian military, resulting in fatalities, and the control of food distribution and supermarkets by the Venezuelan military, leading to instances of hunger. Consequently, despotic power operated covertly under the guise of infrastructural power and political sovereignty, enabling the endorsement of practices that inflicted harm on ordinary citizens and their livelihoods. The state's despotism, sponsored by the incumbents' political strategies, reflects a scenario where citizens faced challenges in resisting state actions through military power, highlighting the limited capabilities of citizens to oppose this arbitrariness.

Venezuela, during Chavez's era and later during Maduro's tenure, experienced food shortages unprecedented in the history of Latin American countries, even surpassing the constraints faced by Cuba due to the United States embargo. The paradox lies in Venezuela's abundance of natural resources available for export and revenue generation. However, the situation grew intricate due to the inherent contradictions within the Bolivarian political strategy, the impact of the United States embargo, and the country's inability to achieve self-sufficiency in food production, rooted in a longstanding tradition of dependence on imported goods.

In the initial years of Chavez's government, from 1997 to 2013, poverty witnessed a notable decline, dropping from 48.1 to 19.3 percent, while extreme poverty decreased from 27.3 to 8.8 percent. This improvement in living conditions garnered support for the Bolivarian political strategy among the populace (Candela, 2016, 125). Nevertheless, starting around 2007, challenges in obtaining various commodities became widespread, culminating in a severe shortage of food by 2012. In 2016, a Swiss news agency reported an 80 percent shortage of food items in Caracas, significantly impacting the quality of life, particularly for ordinary citizens (Swiss Info, 2016).

Several factors have been identified as contributors to this dire situation, including rampant hyperinflation, economic stagnation, the United States' economic blockade on Venezuela, the nationalization of numerous food industries, and the excessive reliance on imported food (Human Rights Watch, 2016). Both Chavez and Maduro attributed this crisis to what they termed as "economic warfare" against the Bolivarian political strategy (Corrales, 2017, 31). From prosperity to a food crisis that transformed into a humanitarian crisis, military power became deeply entwined in the distribution of food. Under Chavez's initiative, the *Mercal* supermarket system was established, a state-run company that offered subsidized prices for food and goods in the most impoverished areas of the country. According to an official

source, *Mercal*, which "was born in the 'breast of the Venezuelan military barracks' on April 24<sup>th</sup>, 2003, is an initiative aimed at achieving full national food sovereignty and reducing malnutrition" (Wagner, 2005). The oversight of these supermarkets was entrusted to a high-ranking military officer, with members of the National Guard strictly controlling access according to military orders. Additionally, the companies responsible for the procurement and distribution of food for *Mercal* were under the supervision of active-duty military personnel, frequently entangled in corruption scandals (Arismendi & Pennacchio, 2016). This challenging situation further deteriorated after 2012 when food shortages escalated, leading to protests against many *Mercal* outlets. These protests compelled the National Guard to adopt an even more militarized approach to controlling these supermarkets to manage access to food.

In Colombia, civilian militarism led to a starkly different situation after several years of successful operations against illegal armed groups, but equally devastating for those involved usually vulnerable people. This phenomenon is known as *falsos positivos*, involving the killing of innocent individuals by the military, who were lured under the false promise of job offers in distant regions of Colombia. Typically, those targeted by the army were deceived in impoverished neighborhoods of large cities, with the most tragic cases often involving individuals from Soacha, a town close to Bogota (Semana, 2008, Nr. 1378, 24-28).

Under the Democratic Security strategy, military power had attained considerable prestige among the population, primarily due to successful operations against the FARC. However, in 2007, when mass media exposed the killing of innocent young people (Cambio, 2007, Nr. 742, 38-39), widespread condemnation ensued, challenging Uribe and his political strategy. This event revealed profound ethical and military honor failures within a sector of the military institution. It underscored that the institutional checks established to prevent such

occurrences were remarkably weak due to the urgency to demonstrate operational results in the battleground. The brutality of these killings included offering soldiers five days of vacation or a meal in exchange for one killed person, highlighting the distorted incentives at play.

Almost all members of the Colombian military involved pointed out constant pressure from higher-ups to achieve positive results against illegal groups, particularly the FARC, which led them to commit these atrocities (Semana, 2009, Nr. 1395, 30-33). According to a report from the think tank CINEP, between 2002 and 2008, 945 people were reported as innocent individuals killed by the Colombian army, falsely presented as combatants of left-wing guerrillas. This suggested that, rather than isolated cases, there was a discernible pattern of behavior among members of the Colombian military encouraged by the Democratic Security strategy (Cinep, 2009c). Thus, under a militarized atmosphere driven by the incumbent and his political strategy, people in remote regions and poor neighborhoods of cities became victims of a hyper-militarized and morally perverse logic, justified under the perceived urgent need to defeat left-wing guerrillas.

Although cases studied differ significantly, the impact on individuals and communities was profound, with lasting repercussions due to the civilian militarism fostered by the incumbents. Under the militaristic atmosphere they encouraged, such actions allowed military power to fulfill a despotic role within the context of infrastructural activities. Paraphrasing Tim Wilson, who examines the application of violence, it can be asserted that each society generates its own forms of atrocity. In this context, civilian militarism in Venezuela and Colombia gave rise to unique perversions under the coercive and militaristic logic exerted by the military (Wilson, 2020, 2-3).

In Colombia, the military's killing of innocent people, enticed by promises of employment in a country marked by high unemployment rates, played recklessly with people's lives. Conversely, in Venezuela, a nation grappling with economic blockade and an oil production crisis, food scarcity and elevated prices resulted. This circumstance positioned *Mercal* supermarkets, operated by the military, as among the few stores providing goods for ordinary people, thereby establishing the military as an all-powerful institution in this context of scarcity. Contrary to Mann's perspective, Malesevic pointed out that coercion has become diverse in recent times due to the bureaucratization of various institutions, extending beyond lethal coercion to include non-lethal forms (2016, 118-119). For example, the military's administration of supermarkets, an institution with bureaucratic responsibilities granted by political power, allowed for the exertion of this form of coercion over ordinary people, compelling them to submit to militaristic dynamics encouraged by the logic of civilian militarism. Thus, the varied ways in which people are harmed reflect the reality of each society (Wilson, 2020). The utilization of military power as a source of despotic and infrastructural power not only contributed to the achievement of political goals in each case, but also unfolded within a perverse logic that adversely affected the lives and basic needs of ordinary people.

### **6.5. Civilian Militarism as Repression and Threat to Democracy**

As mentioned in the preceding chapters, state coercion has been deemed beneficial for state consolidation but detrimental for democratic deepening when it is erroneously managed. In Latin America, both processes have progressed on a tumultuous path over the years, notably in Colombia and Venezuela. Despite facing challenges, these two countries maintained democratic regimes, albeit fragile at the turn of the new millennium. These regimes adhered to the minimum traits of democratic governance, such as regular elections, established

political parties, checks and balances, and the subordination of military power to civilian authorities. Often, these traits were absent even in societies that were more dynamic, less divided, and had a more active civil society than Colombia and Venezuela, as observed in countries like Argentina, Chile, or Brazil.

Nevertheless, akin to other nations in the region, state repression has been both present and latent, albeit with varying degrees of intensity. In both Colombia and Venezuela, this phenomenon became more pronounced and politically endorsed in the new millennium within the context of civilian militarism. This involved the adoption of a warlike discourse, a delineation of friend-foe relationship, and robust arguments advocating for the consolidation of the state apparatus to achieve the ultimate goals of each political strategy. In one case, this aimed to establish a re-foundational project based on Bolivarianism and Socialism of the 21<sup>st</sup> Century in Venezuela, while the other sought to increase state capacity supported by security measures to overcome armed threats posed to the state and society in Colombia.

Within this context, it was crucial for incumbents in Colombia and Venezuela to emphasize the democratic character of their political regimes, particularly the political strategies they unfolded. In a comprehensive study of Chavez and Uribe and their respective ideas of democracy, Chumaceiro and Gallucci point out:

Both leaders use similar terms such as community state and communal power. For Uribe, democracy involves balancing security and a better quality of life. However, for Chávez, democracy is clearly reflected in giving more power to the people and their interference in the development of the "revolution (2008, 30).

Similarly, Maduro and Santos continued this trend, underscoring the democratic nature of their regimes despite shortcomings in terms of freedom, liberties, and the separation of powers. This was particularly evident in Venezuela, which underwent a transition toward

authoritarianism. On the other hand, in Colombia, Santos, despite inheriting the Democratic Security political strategy, redirected it into a policy framed under the motto "defense and security for prosperity." He emphasized, for instance, the critical role of peace and dialogue in the long-term consolidation of democracy. In a speech delivered at the United Nations' General Assembly, Santos asserted, "To expand our democracy, build peace, and boost citizen participation, and to permanently break the link between politics and arms" (Santos, 2014). This emphasized the necessity of diminishing the role of conflict and coercion in a country entrenched in a prolonged spiral of violence.

Despite the constant reference to the idea of democracy, repression was a prevalent phenomenon related to state coercion in both Colombia and Venezuela during the peak of the political strategies examined here. This repression took the form of despotic power carried out by military power, functioning as infrastructural power, and was exacerbated by a decidedly militaristic atmosphere, which favored both legal and illegal repressive activities, sometimes acting together shadow forces. According to Davenport, referring to Goldstein, state repression "involves the actual or threatened use of physical sanctions against an individual or organization, within the territorial jurisdiction of the state, for the purpose of imposing a cost on the target as well as deterring specific activities and/or beliefs perceived to be challenging to government personnel, practices, or institutions" (Davenport, 2007, 2). This expert also suggests that the study of state repression has been less explored than other forms of repression not exerted by the state, however, this assertion is only partially accurate. The study of state repression has, in fact, been present in the social sciences across Latin America for a considerable period (Ortiz, 2015).

This tradition has been made possible by two seemingly contradictory situations. On one hand, there has been intense human rights activism in the form of the fight for democracy

denouncing human rights violations, while on the other hand, military authoritarianism increased these kinds of crimes. State repression in Latin America has encompassed actions such as torture, arrests, intimidation, harassment of political opposition, espionage, and brutality against individuals during protests. Incumbents, at times covertly and at other times overtly, sponsored state repression in both Colombia and Venezuela. This represents an explicit manifestation of civilian militarism that recurrently claims the democratic character of these governments while simultaneously exerting extreme coercion against political opposition and ordinary citizens, revealing another facet of their political strategies.

Many instances of state repression involve the utilization of official state coercion forces, such as the military, militarized law enforcement, and intelligence services, acting alongside shadow forces. Together, these elements represent both the epitome of perils and the manifestation of civilian militarism. Embedded into political strategies, they enabled the attainment of goals but concurrently harmed democracy by violating basic civilian liberties and freedoms, impeding political rights, and curtailing the right to protest and oppose incumbents and their policies. This illustrates and substantiates how civilian militarism is primarily consolidated due to domestic circumstances rather than geopolitical competence, at least in the context of the comparative study of Colombia and Venezuela. While certain impacts of the latter may be present, they are secondary and not the main driving force behind the emergence and particularly the consolidation of this phenomenon.

The threat and use of state coercion represent one of the traits of the modern state, which, in the interplay between political power and the military, can be easily justified and encouraged by incumbents, sometimes supported by omission or arising as a by-product of a highly divided political and social context. Davenport, in discussing the concept of "domestic democratic peace," notes that fully democratic and fully authoritarian regimes tend to

minimize the use of state repression (2007, 11). For opposing reasons, in democracies, institutional procedures channelize civil society's political and social discontent, while in fully authoritarian regimes, as suggested by Juan Linz, political apathy and demobilization of the population become common (Linz, 2000, 54). However, in intermediate regimes—neither fully democratic nor fully authoritarian—contestation to the political regime is met with various forms of state repression. Studies on democratization have indicated that when there is a high political cost or international condemnation, regimes tend to avoid resorting to repressive actions (Bermeo, 1997, 315). Therefore, in Colombia and Venezuela, it appears that incumbents could bear the cost of such actions, either due to the majority of the population supporting them or because of a highly divided political landscape. The government's use of discourse, framing those who protest or oppose them as agents seeking to destabilize democracy, further contributed to their ability to carry out repressive actions. The combination of civilian militarism, the militarization of domestic issues, and state repression worked in tandem to help retain political power, implement incumbents' political strategies, and keep political opposition at bay. Following Randle to some extent, it can be asserted that the increase and consolidation of militarism, led by civilian authorities, facilitated the escalation of state repression. However, as this author pointed out, "the intensity of repression is harder to measure, since repression can take varied and subtle forms" (1981, 67).

In both countries, the manifestation of state repression differed, but a militaristic atmosphere favored its presence. In Venezuela, political opponents, mass media, and NGOs were systematically persecuted in a subtle manner through social and political delegitimization, as well as the rejection of broadcasting licenses for radio stations, newspapers, and TV channels that supported protests (Lopez, 2011). Chavez and Maduro attempted to utilize legal

strategies to suppress dissent, though there were instances where such approaches were not employed. One of the most conspicuous manifestations of state repression manifested in actions taken to quell protests. Protests offer a relatively straightforward metric for assessing state repression, even though the available information may not be consistently comprehensive over the years. One of the most critical years concerning protests, state repression, brutality, and persecution was 2014, when the Maduro government deployed radical state repression primarily through the National Guard, with the Army in a reserved capacity. Also, *colectivos* were significantly involved in suppressing protests.

According to the NGO *Observatorio Venezolano de Conflictividad Social* [Venezuelan Observatory of Social Conflict], there were 9,286 protests in that year, with 52 percent directed against the Maduro government (2014). This year became infamous as 42 people lost their lives. Under these circumstances, the Maduro government decided to incarcerate opposition leader Leopoldo Lopez on charges of conspiracy, terrorism, and violence. He was later released after several years in prison through the intermediation of the international community. The *modus operandi* during that year was similar to other peaceful protests but more extreme. According to this NGO, the government responded with "a speech of disqualification, systematic repression practices, militarization of some cities, and criminalization of protest. This situation promoted an escalation of the conflict with lamentable results throughout the country" (Observatorio Venezolano de Conflictividad Social, 2015, 4), allowing the disproportionate use of state coercion against civilians.

In Colombia, the situation and state repression were critical, involving a combination of state action against protests and political opposition mainly during Uribe's tenure. Even Santos, before working with Uribe, highlighted that "the constant questioning of those who do not share the democratic security policy, as well as the attitude towards NGOs and the way he

attacks them, are factors that have significantly undermined the democratic check and balances" (Cambio, 2004, Nr. 578, 21). From the presidential discourse, there was delegitimization, discursive persecution, and even tacit approval for any illegal actors, such as shadow forces, to act against government opponents. A famous scandal known as *chuzadas*, involving illegal interceptions of journalists, academics, political opponents, and members of the Colombian Constitutional Court by army intelligence services, further underscored the extent of state repression (Hervieu & Posada, 2010, 3-4).

Another brutal form of state repression was directed against those considered bulwarks of crime in the fight against illegal armed groups. Perhaps the most renowned example was the Orion Operation, the largest urban military operation in the history of the armed conflict in Colombia. This operation involved a substantial military deployment in Medellin, utilizing military tactics (Cambio, 2002, Nr. 487, 40-43). Investigations by NGOs and the judicial branch confirmed the collaboration between military power and paramilitary forces against civilians (Sanchez, 2023).

Likewise, protests during Uribe's tenure skyrocketed from around 420 in 2002 to 1000 protests in 2008 (Cinep, 2014, 5). This coincided with a high level of stigmatization of protests by the government, considering them as instruments of left-wing guerrillas aimed at undermining the Democratic Security strategy. The government labeled protestors as "useful idiots," "unarmed guerrilla people," "terrorists," and "guerrillas' intellectuals" (Cinep, 2009b). This led to the general population delegitimizing the protests and supporting their suppression with an iron hand, primarily by the ESMAD, a militarized police corps trained to confront protests and riots. During the Uribe era, the ESMAD was often involved in extreme violence against people, sometimes resulting in fatalities, as part of the criminalization of social movements, as pointed out by Marie-Christine Doran in her study

of Latin America. Her research also highlights the idea of justification for the use of state violence as a result of the population's lack of commitment to democracy (2017).

One of the most representative cases of repression and stigmatization of protests during this term occurred in 2008 with a protest led by the *Minga Indigena*, a well-organized indigenous social movement marching from southern regions of Colombia to Cali, the capital city of the Department of Valle. The march aimed to denounce the excesses of the Democratic Security strategy and protest against the intention to sign the free trade agreement with the United States. Uribe publicly claimed that this social movement had been infiltrated by left-wing guerrillas. In response, the ESMAD, with the support of the Army, attempted to halt the march using live fire. Several indigenous individuals were wounded, and two were killed. According to indigenous speakers, "Uribe declared a war against them" (Botero, 2008). Despite government denials of using weapons against protestors, video reports demonstrated that the Military and Police fired upon the indigenous protestors (Lozano, 2008). After this event, protests declined drastically due to the fear of state repression. However, after Santos assumed political power and adopted a more open perspective on social movements, the number of protests increased in anticipation of better treatment. Nonetheless, denunciations of state repression continued (Cruz, 2016), highlighting how these behaviors have been deeply ingrained in the security agencies dealing with these social movements, irrespective of differences in government perspectives.

In a context surrounded by civilian militarism, the likelihood of state repression is high, justified under the context of incumbents' political strategies. Civilian militarism mainly emerged due to domestic factors and is less of a by-product of interstate competition. In this sense, it is primarily focused on the domestic front to serve the implementation of incumbents' political strategies. In fragile democracies, repression is highly likely due to a

lack of accountability, limited civil society involvement in political activities, and, at times, societal apathy. In both cases, a democratic *façade* was always present to justify state repression, which, in these types of governments, provided a pathway to transition to an authoritarian regime, highly pronounced in the case of Venezuela.

## **6.6. Conclusions**

Mazzuca points out that the state possesses critical power in managing the means of destruction (2010). Ideally, coercion should be in the hands of military power, which, acting in concordance with political strategies, can contribute to state consolidation. However, this can also include an abusive side intended to attain political goals. Without proper democratic restraints and fueled by popular support granted to incumbents, it can contribute to abuses in the use of state coercion, deteriorating democratic deepening, sometimes carried out in the name of ultimate goals executed under the framework of civilian militarism to save the country. The use of state coercion by military power in both cases raises substantial political and ethical concerns. This was permitted due to the absence of a more consolidated civil society, which had been fractured and subdued by legal and illegal forms of coercion linked to incumbents' political strategies.

As presented in this chapter, state coercion under civilian militarism takes various forms that contribute to the creation and consolidation of military units/programs and facilitating the emergence or consolidation of shadow forces. Military power is also used as a source of infrastructural and despotic power, impacting the lives of ordinary people in a harmful way controlling life/death or food, yet serving as a critical tool for state repression mainly against protests. Together, these aspects are not only interconnected as manifestations of civilian militarism, as I have called this phenomenon led by civilian authorities, but I have also

demonstrated how military power is intertwined in this process, with a lasting impact on democracies that were already fragile.

This phenomenon is closely linked to the overstepping of incumbents in the use of both military power and state coercion, with a tendency to accumulate excessive power, supported in some respects by presidential traditions and the exacerbation of incumbents' power due to popular support. However, this state coercion is mainly directed toward the domestic realm rather than the international one.

## CONCLUSION

### Contributions

This dissertation significantly advances our understanding of the emergence and consolidation of civilian militarism, utilizing the cases of Colombia and Venezuela as illustrative examples to illuminate this intricate social and political phenomenon. The focal point of this research lies in unraveling the intricate interaction between political and military powers, crucial components of the political strategies orchestrated by democratically elected leaders. These leaders aim to ameliorate the deteriorated state capacity and achieve their political goals.

These political strategies sought to rectify or mend societal and political issues through a multifaceted approach that incorporates militaristic components. Regrettably, the impact of these strategies was detrimental to the already fragile democratic regimes in Colombia and, notably, Venezuela. The latter experienced a more pronounced negative effect, transitioning into an authoritarian regime propelled by an augmentation of presidential roles that strategically harnessed military power as a pivotal tool and backbone.

This research took a comprehensive approach to the exploration of militarism, extending beyond merely understanding the escalation of military presence and militaristic behaviors within society. Its primary focus lies in the discussion surrounding democratic deterioration (backsliding), the surge in autocratization, and the inherent tension between the augmentation of state capacity and the consolidation or deterioration of democracy, particularly within the Latin American context.

By conceptualizing civilian militarism as a phenomenon, this dissertation becomes a valuable contribution to the discussion on how political incumbents utilized militaristic components within a well-coordinated political strategy. This strategic integration facilitated the transfer

of political power to close allies, advocating for the continuation of these political strategies as solutions to the existential problems faced by these countries. Crucially, the dissertation underscores that civilian militarism unfolded within the bounds of democratic procedures, often favored by presidential systems and specific political institutions and traditions, such as decisionism.

Therefore, the concept of civilian militarism proves instrumental in describing domestic militarism within the framework of emerging political leaders with radical projects. These presidents deployed a set of militaristic actions, procedures, and attitudes with the overarching aim of attaining specific political goals. In essence, this dissertation not only enriches our understanding of civilian militarism but also provides valuable insights into the complex interplay between democracy, state capacity, and political strategy within the Latin American context.

A prominent conclusion drawn from this academic work is the inherent complexity in categorizing political strategies as inherently good or bad. The analysis of both primary and secondary sources consistently reveals that incumbents embarked on political actions with elevated intentions, aiming to enhance their societies and political systems. However, this noble pursuit often came at the cost of democratic principles and involved tactics to diminish political opposition. Notably, military involvement was considered crucial for civilian leaders with radical political strategies, as the military not only embodied national values but also possessed formidable coercive and organizational capabilities.

Examining these political strategies, it becomes evident that they were shaped by leaders who sought to address the challenges faced by their societies. Despite noble intentions, these strategies incorporated a core set of ideas that, among their principles, justified the accumulation and control of political power from an authoritarian standpoint. This erosion

of democratic rules and persecution of political opposition served the leaders' agenda to impose their worldview. The combination of political ideology and strategic objectives renders these political strategies transcendental, yet simultaneously intolerant and confrontational on both domestic and international fronts, albeit more discursive in the latter. This dissertation significantly contributes by analyzing political and military power, alongside militarism, through a multidisciplinary lens. The historical perspective, encompassing comparative politics, historical sociology, and military sociology, provides a nuanced understanding of changes over time, the causality between presidential political systems, and the peculiarities of military or quasi-military institutions under the influence of incumbents' political strategies. The research sheds light on the emergence and consolidation of civilian militarism in Colombia and Venezuela, elucidating the singularities and procedures involved.

Notably, the dissertation explores why, despite similar developments, Colombia did not transition to authoritarianism. This underscores the importance of democratic checks and balances and the role of civil society in resisting authoritarian tendencies. This insight is valuable even at the operational level, guiding the implementation of strategies to counter civilian militarist projects. It emphasizes the need for the re-professionalization of the military, ensuring their subordination to democracy rather than allegiance to a specific political strategy.

In essence, this research enhances our understanding of militarism, in this case, civilian militarism, as both a concept and a phenomenon, unraveling its complexities and delineating the procedures integral to its emergence and consolidation. The comparative analysis enriches our knowledge of the intricacies involved in different political contexts, contributing

to a broader comprehension of the interplay between political power, militarism, and democracy.

In the first chapter, I explored Mann's approach and its significant contributions to this analysis, particularly in understanding the interactions among various sources of social power and the pivotal role of militarism in contemporary societies. Mann conceptualizes the military as an autonomous source of social power, a perspective that proves invaluable in this analysis, especially when considering the historical context and behavior of military power in Latin America. The concept of civilian militarism emerges as a distinctive form of militarism, shaped by economic alterations in domestic realms and crises in other spheres. These circumstances provided incumbents with the opportunity to employ a range of militaristic practices, behaviors, and societal norms, collectively categorized under the term "civilian militarism," in this dissertation. This conceptual framework becomes particularly useful when these elements are strategically woven into the political strategies of elected leaders, serving as a means to achieve their political goals. Furthermore, the dissertation explored the utilization of military power as a source of both infrastructural and despotic power, with varying intensity aligned with the political strategies of incumbents. This manifestation of civilian militarism is intertwined with a process akin to the remilitarization of the state. The influence of neoliberalism surfaces as a significant factor in the emergence of radical political projects that incorporate militaristic traits to counteract the deterioration of state capacity. The comparative study of Venezuela and Colombia offers a compelling opportunity to test the emergence of militarism in countries with democratic traditions, despite some inherent challenges. It also allows for an examination of whether civilian militarism is predominantly focused on the domestic or international arena. The analysis aims to unravel how rivalries are navigated, considering the differences in political ideologies among presidents.

In essence, the dissertation draws on Mann's framework to enrich our understanding of the multifaceted dynamics of civilian militarism. The exploration of economic, political, and social dimensions, coupled with the historical context, provides a comprehensive analysis of the intricate interplay between militarism and political strategies in the Latin American context.

In the second chapter, the examination reveals the coexistence of liberalism in Latin America alongside the emergence of militarism, particularly under specific circumstances that favor the latter. Neoliberalism, with its inherent contradictions, contributes to the deterioration of state capacity, prompting incumbents with distinct political strategies to seek the remilitarization of the state through coercion via military power. Despite the stability of democracies in Colombia and Venezuela due to consociationalism based on clientelism and consolidated political parties, these phenomena constrained the emergence of an autonomous state, capable of resisting crises and individualistic political projects. The military, which maintained autonomy with traits from the Cold War era, remained a significant force contributing to the relationship with incumbents harboring radical projects. The absence of military reforms, coupled with a preserved prestige among the population, allowed for their strategic utilization during times of crisis.

In the third chapter, the focus shifts to how militarism became a response to crises and a strategy employed by democratic leaders to retain political power within established political institutions and traditions. The overarching goal was to augment state capacity while retaining political power through the deployment of civilian militarism. While both the Bolivarian strategy in Venezuela and the Democratic Security strategy in Colombia incorporated civilian militarism within their political strategies, the effectiveness and longevity of each differ. The Bolivarian strategy, employed by leaders like Chavez and later

Maduro, proved enduring and effective in consolidating power, leading to a transition towards authoritarianism. The Democratic Security strategy, championed by Uribe, was time-limited and constrained by democratic institutions.

This chapter introduced the concepts of "strong president" for Uribe and "martial president" for Chavez, capturing their militarist leadership styles. Both strategies shaped enemies, serving as a means to attract followers and suppress opposition in an anti-democratic manner. While militarism was not the sole determinant of a regime transitioning to authoritarianism, it played a crucial role in revealing how incumbents integrate the military into non-military functions, thereby diminishing democratic quality. The popularity of both strategies and their leaders is acknowledged, but the radical nature of the Bolivarian strategy endures due to consolidated power, an aligned political party, and limited democratic checks and balances in Venezuela. In contrast, the democratic security strategy's impact in Colombia was effectively curtailed by opposition forces, congress, the Constitutional Court, and the actions of Uribe's successor.

In the fourth chapter, the analysis delves into how civilians strategically orchestrated militarism, utilizing the military as a dual source of infrastructural and despotic power. This orchestration was made possible by the organized structure and coercion capabilities of the military, coupled with the glorification of their role as saviors of their respective countries. In both Venezuela and Colombia, military power played this dual role, with Venezuela additionally involving the military in non-military activities as a form of infrastructural power. The political projects in both countries provided clear missions, roles, and perceived threats, ensuring specificity in the utilization of military power. In Venezuela, the incumbent guaranteed the enactment of well-detailed laws to guide military activities. Loyalty from the military was secured through the granting of prerogatives and incentives, which were

integrated into a civilian militarist perspective. Incumbents, embodying the persona of the "ultimate soldier of the country," as seen in figures like Uribe and Chavez, led by example, showcasing discipline, multitasking skills, authority, sacrifice, and paternalism—all qualities highly appreciated by the military.

Within this civilian militarist atmosphere, incumbents spearheaded changes in the military realm. In Venezuela, there was a reform reshaping military roles and duties aligned with national development and the Bolivarian strategy. In Colombia, a transformation at the strategic and tactical levels aimed to enhance military performance through Joint Commands. Consequently, military power was positioned as a vital source of both infrastructural and despotic power, facilitating the consolidation of civilian militarism in both countries.

The alignment of political strategies, roles, missions, and military power, coupled with the co-optation of the military by incumbents, naturally led to the routinization of civilian militarism. However, the implementation worked differently in each case, presenting a useful aspect in the contention of militarism even in the real world. In Venezuela, military power was politicized under Bolivarian ideas. In contrast, in Colombia, the main objective was to achieve re-professionalization, intending to subordinate the military and reaffirm its role as a coercive instrument. In both countries, military power became deeply embedded in the civilian militaristic atmosphere, serving to bolster state capacity. However, in Venezuela, it ultimately undermined this capacity, while in Colombia, military roles and missions were primarily confined to the internal armed conflict.

In the fifth chapter, I challenge the prevailing perspective in existing literature regarding the emergence of militarism, asserting that, in the cases studied, it was propelled not solely by geopolitical competition but rather by the contradictions of neoliberalism and various domestic factors. The distinct challenges and goals of incumbents, rooted in their political

projects, played a pivotal role in driving the emergence of militarism. While geopolitical competition did contribute to rivalry, deepening differences based on political ideologies and disputes between great power allies, I demonstrated that all political efforts were ultimately geared towards protecting political strategies. Despite heightened tensions that almost led to a military confrontation, a shared identity based on the concept of *Hermandad Latinoamericana* (Latin American Sisterhood) played a crucial role in de-escalating the situation.

The militarization of certain law enforcement units, such as the National Guard in Venezuela and the National Police in Colombia, indicates that militarism was primarily oriented towards the domestic front. Militaristic diplomacy was employed not only to secure allies but also to showcase the benefits of political strategies, including military cooperation. However, the Bolivarian political strategy exhibited greater ambition on the international stage. A notable by-product of militarism was the latent danger of interstate war, a scenario that was effectively contained thanks to elements of Latin American identity and the role of civil society in de-escalating confrontation. Coercion, when domestically oriented, proved useful as a means to enhance state capacity, protect sovereignty, and achieve domestic security. Thus, this chapter underscores the multifaceted nature of militarism, revealing its intricate connections to both domestic and international dynamics. The analysis highlights the delicate balance between geopolitical factors and the local intricacies of political projects, emphasizing the importance of shared identity and civil society in averting potential conflict and maintaining stability.

In the sixth chapter, I explored the negative impact of civilian militarism on democracy, challenging its facade of legitimacy and legality that often relies on popular support at the polls. Despite being framed as a means to enhance state capacity within long-term political

strategies, civilian militarism harms democracy by resorting to coercion to address problems rather than implementing structural changes. This approach deteriorates the quality of democracy and exhibits authoritarian traits.

In this chapter I explored from a micro-level perspective, acknowledging challenges related to accessing certain sources. Despite these challenges, the chapter effectively demonstrated how the political strategies of incumbents, propelled by civilian militarism, gained momentum in remilitarizing the state and increasing state capacity, ultimately harming democracy through extreme cases of abuses and violations of civilian freedoms and liberties. Civilian militarism created an atmosphere characterized by repression, involving both official and shadow forces. The creation of units like Bolivarian militias and "Soldiers of My Town" served the dual purpose of fulfilling incumbents' political strategies and disseminating a militarist perspective among ordinary people. These units also proved useful for gathering intelligence information. Shadow forces, such as *Colectivos* and *Aguilas Negras*, thrive under civilian militarism embedded in political strategies, aiding in achieving political goals and neutralizing opponents at the cost of democracy. Military power, utilized as both infrastructure and despotic sources of power, is perversely employed against vulnerable populations, whether through managing food distribution under a militarist logic or carrying out assassinations by the Colombian military that disproportionately affected the poor.

Repression, a manifestation of civilian militarism, is extensively used by the Maduro government to contend with opposition and maintain control of political power. The use of state coercion by military power in both cases raises substantial political and ethical concerns, eroding the fundamental principles of democracy.

From a broader perspective, this dissertation contributes various arguments and perspectives, drawing on a wide spectrum of academic knowledge related to Mann's theoretical approach.

It provides elements for analyzing the increase of militarism within democratic regimes, delineates typical actions taken, and explores potential strategies to counter their rise through democratic means. The dissertation sheds light on the intricate dynamics between militarism, state capacity, and democracy, offering valuable insights for further academic and policy discussions.

### **Further Research**

In a tumultuous political environment, both domestically and internationally, it would be beneficial to compare presidential systems with parliamentary ones to examine their propensity for the emergence of civilian militarism or other types of domestic militarism. This is important considering that the analysis of the military, framed under the concept of militarism, can prove rich in unraveling new forms of political control with an authoritarian trait in democratic regimes in the 21<sup>st</sup> century. Additionally, further research is necessary to explore the interaction between domestic and international factors and investigate whether domestic militarism, including civilian militarism, can contribute to international adventures with a geopolitical character when led by elected political leaders who feel the need, urgency, or see the opportunity to have such aspirations. This analysis would benefit from both large-n comparative analysis and detailed small-n comparisons to explore the causes and impact of bellicose traits, mainly through historical analysis.

Likewise, quantitative research utilizing big data could prove useful in establishing whether the deterioration of state capacities promotes militarism as a means to enhance these capacities, incorporating civilian militarism as a tool to replace the lack of interstate wars that had proved beneficial to state capacity consolidation. This is especially relevant given the growing concern about the weakening of state capacity, observed not only in the global south but also in the global north. Simultaneously, it is essential to explore how an increase

in militarism (civilian militarism) can deteriorate democratic quality in the long run, observing both similar and different system designs.

Similarly, research focusing on diverse strategies to counteract militarism and authoritarian ventures should be developed, extending beyond the global north to encompass other regions such as Southeast Asia and Africa, which have historically been sensitive to the reappearance of militarism to contend with the deterioration of the state or society in general.

Another critical topic to analyze in further research is the negative impact of neoliberalism on state capacity. Together with the resurgence of discourse advocating for deepening neoliberal reforms, including the reduction of the state apparatus in many countries, it is crucial to investigate whether there is a correlation between neoliberalism and the emergence of militarism in this relationship. Additionally, with the surge of right-wing movements globally, there is an opportunity to explore how people respond to militarism when it is encouraged by political leaders aligned with this political trend, even to contend with waves of illegal immigration as has been happening in recent years in the United States and several countries in Europe.

By addressing these research areas, scholars can contribute valuable insights into the complex dynamics between political systems, economic conditions, and the manifestations of militarism in an increasingly unstable world where domestic and international factors interact deeply. This inclusive approach will not only enrich our understanding of the global south but also provide a comprehensive perspective that extends to the global north and other diverse regions.

### **Epilogue: Testing the Main Argument, Venezuela, and the Essequibo**

During late 2023, the previously taken-for-granted interstate peace across Latin America was disrupted by a series of events between Venezuela and Guyana concerning the Essequibo

region—a territory rich in natural resources that has been in dispute since the 19th century. Despite its longstanding roots, this issue remained under the radar during the peak of the Bolivarian Strategy and was not a major concern. This was due to other concerns, as analyzed in this dissertation. Unexpectedly, Maduro decided to carry out a referendum on December 3<sup>rd</sup>, 2023, asking the Venezuelan people whether they wanted to incorporate this territory into Venezuela.

This unusual situation was framed under a recurrent practice established by the Bolivarian Strategy, as analyzed in this dissertation. Specifically, it aimed to legitimize actions through elections and provide them with a democratic *façade*, despite the incongruity of asking people outside the disputed territory. Behind Venezuela's territorial reclamation, two aspects closely related to this dissertation. On the one hand, despite authoritarian traits in Venezuela, some minimal democratic elements persist, providing room for a potential loss for Maduro's government in the 2024 presidential elections against the opposition leader Maria Corina Machado. This compelled Maduro to reopen this old territorial dispute to give his government a second chance. On the other hand, this is connected with civilian militarism, which, despite emerging as a byproduct of domestic factors to protect the Bolivarian Political Project, having as a primary purpose of retaining political power. This militarist component, widely spread across society, is easily articulated in the context of territorial reclamation, fitting into the so-called geopolitical militarism. However, this appears more opportunistic than being the primary aim of militarism in Venezuela, proving that the main concern is the domestic front.

In this way, these actions seem to be a smokescreen for domestic ends. However, the events are highly dangerous due to the differing identities between Venezuela and Guyana, making the situation difficult to solve and volatile, including extraterritorial actors. Thus, domestic

and international factors are intertwined, although civilian militarism in Venezuela simultaneously plays a critical role. It aims to retain political power but brings with it the consequence of escalating into an interstate war in a dispute that had long been forgotten. Thus, civilian militarism, despite its domestic aims, remains highly concerning when used in the international realm, as it can end up spiraling out of control.

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